

ON05236

PROJECT REPORT

Progress Report: _____ Final Report: X Project Number: 81-1056
 Small-Scale: _____ Large-Scale: X Funding Year: 1987-88 (Y23)
 Transfer Grant: X (Priority: MI(6)) OISE: _____
 New: X Continuing: _____ Terminated: X Re-funded: _____

Project Title: The Development of the Effective Consultant

Investigator(s): Dr. John A. Ross & Dr. Ellen Regan

Budget Unit: Trent Valley Centre/ Date Rec'd in F&SR: Jan 7/88
Applied Psychology/FS&R

ABSTRACT

For large-scale projects, please provide in the space below an abstract of not more than 300 words, single-spaced, written in a language that may be understood by the informed layperson. For small-scale projects, an abstract per se may not be appropriate, and the report itself may be started below.

There is widespread concern, expressed by consultants, teachers and administrators, that curriculum consultants are not as effective as they could be. The strategies that characterize effective consultants have not been identified and what is known about effectiveness in the role is not widely disseminated. There are few opportunities to acquire consultant skills prior to appointment and systematic in-service programs are rarely available to those in the role. Learning consultancy methods occurs in an *ad hoc* fashion on the job--not all consultants develop the required strategies prior to the completion of their terms.

OISE, in collaboration with three boards of education, conducted research to identify similarities and differences in the strategies used by experienced and inexperienced consultants. The research findings were used to construct a profile that describes the development of effective consultants in four phases of their work: initiating, planning, delivery and follow-up. The profile focuses on behaviours that can be learned on the job, rather than on characteristics (such as interpersonal skills) that are important factors in determining which staff to appoint to a consultant position, but which are very difficult to develop once an appointment has been made. This profile was used to construct in-service program for consultants.

This project was funded by the Ministry of Education of Ontario under its Block Transfer Grant to OISE.

THE DEVELOPMENT OF THE EFFECTIVE CONSULTANT

Goals of the Project

1. To identify task behaviour characteristics of more effective and less effective consultants.
2. To develop, implement and evaluate a training process to improve consultant effectiveness.²

Definitions

Ontario Ministry of Education Guidelines state that consultants "shall assist teachers . . . in maintaining proper standards and improving methods of instruction" (Ontario, 1984). A consultant is an educational professional who helps teachers and other practitioners perform their instructional responsibilities more effectively.

Although a number of typologies of consultation have been proposed (e.g., Conoley & Conoley, 1982; Dworkin & Dworkin, 1975; Gallessich, 1982), the dominant type within educational settings is a collaborative problem solving model (Bravi, 1983; Carreiro, 1983). In this model two or more professionals of differing expertise, such as a consultant and a teacher, share responsibility for the identification, development, implementation and evaluation of an instructional program for students. The model is increasingly the method of choice for consultants. There is evidence that when teachers are exposed to this approach to consultation they prefer it to other consultative strategies, such as the medical model in which responsibility for the student is turned over entirely to a visiting expert (Gutkin, 1980; Lambert, et al, 1975). In this report, turning students over to a visiting professional will not be treated as a consultant function, even though many consultants perform this "itinerant teacher" activity to some degree.

The research reported here focussed on internal consultants; i.e. those employed by the school district. In contrast external consultants are employed by an outside agency (e.g., a university) to bring about desired change in schools. Reference will be made in the subsequent literature review to both internal and external consultants. Although there have been very few attempts to compare the roles, the similarities appear to be greater than the differences. Fullan (1981) has proposed that external consultants are more appropriate for reaching adoption decisions; internal consultants are more suitable for implementation. Louis (1981) has argued that external are better for big changes while internal are better for lasting changes.

Motivation for the Study

Interest in the behaviour of consultants has waned in recent years. For example, not a single paper on the role of the consultant was presented at the 1988 annual conferences of the American Educational Research Association and the Canadian Society for the Study of Education. The lack of researcher interest is surprising given (a) widespread dissatisfaction with the role of the consultant among educators, and (b) deficiencies in existing knowledge about the role.

Dissatisfaction with the Role

Dissatisfaction with the performance of consultants is most visible when a board terminates virtually all of its consultant positions, reduces the number of positions and/or fills them with short-term secondments. One major source of dissatisfaction lies in disagreements over expectations for the role. Stennett (1974), in a survey of 245 Ontario consultants, found that a majority were uncertain about their responsibilities and expressed a need for more frequent feedback. Regan & Winter (1978), in a survey of 620 Ontario consultants and their superintendents, found significant disagreement in how the two roles felt consultants should spend their time. Dow & Whitehead's (1981) study of 44 male consultants also found they were unsure about their role in such central matters as curriculum implementation.

Another source of dissatisfaction is the belief that consultants are largely irrelevant to the resolution of teachers' curricular problems. A review of four doctoral dissertations in Alberta (Holdaway & Millikan, 1980) provides some empirical support for this view: the data indicate that most educational concerns of teachers are handled within the school--only 3 to 8% are addressed by district consultants.

There is also the complaint that consultants work with the "wrong" people, that they spend a disproportionate amount of their time working with gifted teachers who seek them out to the detriment of marginal teachers who have a far greater need for consultant services. Again there is some empirical evidence for this concern. Alpert et al (1979) found that consultants preferred to work in situations in which the entry competence of the consultee teacher was high and the potential for change was large.

Finally, there is a significant proportion of the educational community which is not persuaded that consultation "works". Leithwood, Ross & Montgomery (1978) found that central office resource staff were one of the weaker influences on teachers' curriculum decision making. Fullan (1981) concluded his review of consultant strategies with the observation that consultants are not very effective in most boards. Similar conclusions were reached by Firestone & Corbett (1981) in their study of the impact of external change agents on schools. In the absence of evidence of beneficial effects on students and teachers why not expend the resources in other ways?

Deficiencies in Existing Knowledge About the Consultant's Role

Most of the literature on the effects of consultants on teachers is very poor. Data are typically soft, (self-reports predominate); control groups are rarely employed; the treatments provided by the consultants are inadequately described; little information is provided on the characteristics of either the consultants or the consultees; the intervention is usually very short and only rarely is there an attempt to compare the relative effects of competing techniques.

The majority of these studies report positive findings. Mannino & Shore (1975) in a review of 23 empirical investigations of consultation conducted in various fields between 1958 and 1972 found that 74% provided evidence of consultee change. Medway (1979) reviewed 29 school consultation studies undertaken in the period 1972-79: 76% reported at least partial success on at least one outcome. Since these reviews were conducted other studies have reported positive effects of consultants on teachers' diagnosis skills (Conoley & Conoley, 1982; Curtis & Watson, 1980) and implementation practices (Bancker, Eiseman, Cox & Schmidt, 1982; Griffin & Barnes, 1986).

The products of this research are weak because the nature of the interventions is so poorly described: specific actions that one could recommend to consultants do not emerge. This is especially problematic in that there are indications that consultant interventions can have a negative effect on teachers. Curtis & Watson (1980) found that only highly skilled consultants (identified through an observation scheme and paper and pencil instrument prior to the treatment delivery) improved teachers' diagnosis skills. The performance of teachers randomly

assigned to low skilled consultants deteriorated over the course of the study; these teachers performed more poorly than teachers not given any consultant support.

There are fewer studies which trace the effects of consultant intervention to student outcomes. Mannino & Shore (1975) found 19 studies produced in 1958-1972 that looked at the effects of consultants on the ultimate clients; the few school studies in this set showed some changes in student behaviour. Since this review a few other studies have reported impacts of consultants' interaction with teachers on students (Bergan & Tombari, 1976; Conley, 1983; Randolph & Wallin, 1973). Effects equivalent to other available student improvement strategies were found by Marchant (1972). In contrast, Griffin & Barnes (1986) found that consultants' work with teachers had no measurable effect on students. These studies have shortcomings similar to those of the previous set: the specific consultant behaviours that make a difference were not investigated.

A few investigators have attempted to identify specific consultant behaviours which lead to change. Most of these studies were correlational inquiries examining the effects on teachers of variations in the quantity of consultation. For example, several studies (Louis, 1981 and Loucks, et al., 1982) have found that schools in which support was provided by two groups of consultants (internal and external) showed greater evidence of change than schools in which only one time was involved. Several other studies (Curtis & Watson, 1980; Louis, Rosenblum & Molitor, 1981; Miles, Fullan & Taylor, 1978; Runcell & Bell, 1976; Tyler & Fine, 1974) have found that the duration of consultant-teacher contact had a positive impact on teacher growth. Other investigators have made finer distinctions in terms of the time variable. Loadman & Mahan (1972) found that small differences in elapsed time masked large differences in how consultants spent their time: effective consultants spent dramatically more time in in-service and modelling activities, especially demonstration teaching. Louis & Sieber (1979) found that when the consultant time was delivered (during implementation rather than up front) mattered more than the total amount of time given.

There have also been studies linking qualitative differences in consultant behaviour to various outcomes. In a review of the external change agent literature, Louis (1981) found that personal characteristics (e.g., the extent to which the change agent and the client shared common characteristics) had a substantial impact on change. Attempts to identify differences in the effects of strategies used by consultants have been less successful. Firestone & Corbett (1981) found no external consultant activities that consistently produced change; similar findings were reported by Louis & Kell (1981). Miles, Saxl & Lieberman (1988) attempted to distinguish between the strategies used by external consultants who were rated as outstanding by project managers and those who were rated average: the differences were small and inconsistent, mainly because there was insufficient discrimination between the two groups.

There have been a few intervention studies that attempted to systematically vary the strategies used by consultants. Cossairt, Hall & Hopkins (1973) found that a consultant was more effective if s/he praised teachers' implementation of new teaching methods than if other feedback strategies (e.g., providing data on the effects of teacher change on student performance) were used. Conoley & Conoley (1982) found a slight advantage for a strategy in which consultant and teacher observe target students together rather than having the teacher describe the behaviour to the consultant. Bergan & Tombari (1976) found student and teacher effects for consultant flexibility (the number of different techniques recommended by the consultant to the teacher) and for the extent to which the consultant elicited responses from teachers.

There have also been a few empirical studies of attempts to improve consultant performance. Most are seriously inadequate. For example, Broskowski, et al (1973) claimed positive effects for a 12 week training program, but the nature of the treatment was only briefly sketched; the effects on consultants were based on very soft self-report data; there was no comparative group and the effects on consultees and clients were not examined.

More rigorous studies were located. Goodwin & Coates (1973) provided lectures on theory with simulations and guided practice in school and lab contexts. They found large changes in the consultants (better consultative strategies were used in simulated interactions with

teachers), which led to improvements in teachers (in terms of matching instructional efforts to the times at which students are attending), which led to improvements in students (in terms of increased attention given to the lessons). Even though this study is exemplary in its attempt to trace the effects of consultant training to the ultimate clients, there was no control group. Griffin & Barnes (1986) found that staff developers randomly assigned to a treatment consisting of five days of films, readings and discussion on the findings from effective schools research developed more of the desired consultant behaviour than a no-treatment control group. Teachers interacting with treatment group consultants adopted more of the desired teacher behaviour but there were no student differences. In contrast, Louis & Kell (1981) found that training consultants had little impact on outcomes.

The absence of well-documented attempts to improve consultants may be attributable to deficiencies in existing knowledge about the role. There is a lack of knowledge about the behaviour that distinguish effective from ineffective consultants. The search for effectiveness--in schools, teachers, principals and supervisory officers--has not been matched with a quest for the effective consultant. What little is known about the characteristics of effective consultants is based upon gross variables (such as the effects of the presence of consultation or the amount of consultation). Furthermore, previous investigations have tended to address bipolar rather than continuous variables. Research in training other roles (e.g., students, teachers and principals) indicates that development on complex objectives is best conceptualized in terms of levels of growth rather than presence or absence of the desired behaviour.

The main purpose of the study reported here was to identify differences in the strategies used by experienced and inexperienced consultants, and then use these differences to construct an in-service program for consultants new to the role.

Study Methods And Procedures

The development of specific consultant behaviors can be represented as a maturational process. A profile provides a picture of the consultant's professional growth from his/her beginning or "novice" days in the role to the achievement of the level of "expert" consultant. Because the literature provided very little useful information in this regard, it was decided that the most viable approach to the task was to talk with consultants themselves about their work. The focus on the developmental nature of professional development indicated a need to talk with both experienced and less experienced consultants. A similar approach has been used in research concerned with identifying differences between more and less experienced teachers (Berliner, 1986).

Although interviewing consultants was seen as the principal means of data gathering, it was recognized that how consultants responded to interviews would determine, to a considerable degree, the ways in which the data could be interpreted and reported. Therefore the study methodology evolved in response to the data collected at different stages. Although the data were considered in relation to some ideas in the literature, when appropriate, (e. g., widely acknowledged steps in consulting process), what emerged from the interview data determined the scope and substance of the reported findings. Before elaborating on the methods (and their evolution) employed in gathering, analyzing and interpreting study data, a description of the sample and a few comments about study limitations are in order.

Sample

With the assistance of school administrators, a sample of three experienced and three inexperienced consultants was recruited in each of two large school boards. Each consultant completed a questionnaire (Appendix A) designed to collect relevant demographic data. Questionnaires were distributed and completed during the first reporting-feedback session in each board. Following is a summary of the professional experience/academic background and professional training of the twelve consultants.

Questionnaire data indicate that all experienced consultants came to their present positions from other consulting and/or administrative positions in their respective boards, e.g., support team, vice-principal, department head. All experienced consultants had at least three years experience in the role with four of the six consultants having more than seven years of consulting experience. Two of the inexperienced consultants had two years of consulting experience, but for one of these consultants, the position involved half-time consulting/half-time teaching. Each of the other four inexperienced consultants had one year of consulting experience. Two of the inexperienced consultants held department head positions prior to their current positions and a third moved, this year, to a vice-principal position.

Although two consultants failed to specify years of teaching experience, responses of 10 consultants and other information confirm that all consultants in the sample had at least seven years of classroom teaching experience, with three experienced and four inexperienced consultants each reporting more than 15 years teaching experience. As a rule the level and/or curriculum area associated with classroom teaching related to the consultants' reported areas of responsibility, e.g., a French consultant taught French and Spanish, a primary-junior consultant taught in grades K-6.

With respect to present positions, consultants in the sample reported considerable variation in both the curriculum areas and levels for which they are responsible. These variations range from responsibility for a curriculum area across all levels (e.g., Arts program, K-OAC) to responsibility for most curriculum areas for one or two levels (e.g., academic areas, K-6). Experienced consultants, as a group, have more K-OAC or 3-OAC level responsibilities than do inexperienced consultants, as a group. Program areas identified as concerns for individual experienced consultants include: Art, French, Communication and Special Education/Gifted. Program areas identified as concerns for individual inexperienced consultants include: Technological Studies, Outdoor and Environmental Studies and Guidance. Responses from three inexperienced consultants (two from Board B and one from Board A) suggest responsibility for most curriculum areas at Primary/Junior and/or Junior/Intermediate levels.

Nine consultants (six experienced and three inexperienced) reported examples of "other leadership" roles in curriculum development in their present boards. In this regard, all nine consultants cited involvement with "writing teams" or "program writing". Other leadership activities identified in individual responses include: "curriculum development", "curriculum review" and "in-service for teachers and principals".

The consultants in the sample have had most, if not all, of their professional experience in their present boards. Only one, an experienced consultant, reported working in a consulting position in another board. During their professional careers, two of the experienced consultants (from the same board) taught in Europe. Two inexperienced consultants (one from each board) worked three and seven years respectively, in out-of-school settings which related, however, to their present positions. The Outdoor and Environmental Educations consultant was employed as an Information and Education coordinator by the Conservation Authority. The Technical Studies consultant was employed as a draftsman. Three consultants reported career gaps associated with maternity leave and/or homemaking. One consultant was employed for two years as a dental assistant and another reported time as a parish minister.

All consultants in the sample have undergraduate degrees and five of the experienced consultants have M.Ed. degrees. Two inexperienced consultants have M.Ed. degrees and two are in the process of completing the M.Ed. With one exception, each consultant in the sample has at least one specialist's certificate with nine having two or more of these certificates. Both experienced and inexperienced consultants cite Ministry of Education courses, university courses, and workshops and conferences sponsored by professional organizations and groups as providing additional academic and professional training.

One item on the questionnaire (item 15) asked consultants to describe "any specific training for consulting received." Another item (item 16) asked for descriptions of "any other training/experience. . .relevant to consulting." Responses to these two items indicate considerable overlap. For example, three consultants (one experienced and two inexperienced) identified the *Lonely Runner*³ conference as specific training for consulting whereas a fourth

consultant (inexperienced) noted no specific training for consulting but identified the *Lonely Runner* conference as "other" relevant training/experience. Similarly, a board "leadership course" cited as "specific training" by two inexperienced consultants was identified as "other" relevant training/experience by the third inexperienced consultant in the same board. Of the four consultants (two experienced and two inexperienced) who indicated that they had received no specific training for consulting, two (one experienced and one inexperienced) suggested, however, that certain "courses" had been useful in this regard. The experience of receiving feedback from peers, learning on the job and associating with other consultants were mentioned as "relevant" to consulting. The twelve consultants' responses suggest that, for most, their training for consulting is seen as deriving from a combination of courses, conferences (particularly the *Lonely Runner*) and certain professional experiences.

The two boards selected for the main data collection were invited to participate in the project by the investigators. Both had expressed an interest prior to the project in examining the activities of their consultants. Board A was a very large board in central Ontario with a comparably sized consultative staff. Consultants had formal job descriptions that varied in detail but tended to be quite specific about the role to be performed. Board A consultants worked at the direction of superintendent-like coordinators⁴ who in turn reported to a superintendent of curriculum. The senior administrators of the system identified curriculum priorities and assigned consultants the task of implementing these priorities in collaboration with principals. Some consultants worked across the system; others limited their activities to a designated group of schools. Consultants were appointed to the role for 2 or 3 year terms; in many cases these appointments were renewed several times to extend for major portions of the incumbents' careers.

Board B was a medium sized board located in the same region with a smaller staff. Their job descriptions tended to be looser than those in Board A and each consultant was required to cover a broader curriculum area over fewer schools. Board B consultants reported to a superintendent of curriculum, often through a group of coordinators. These coordinators, (two were included in the sample), were experienced consultants with the added responsibility of coordinating the implementation of system priorities. System priorities were developed by the senior administration with great attention to consistency from one year to the next and with considerable input from consultative staff. As in Board B, some consultants worked across the system and others focussed their efforts in a limited number of schools. Consultants were appointed for fixed terms but they were encouraged to move backward and forward between consulting and line positions.

The similarities between the boards were greater than the differences; there was even evidence of exchange of personnel at senior levels. Besides the obvious size differences there were less visible but important differences in curriculum organization. Officials in Board B expected consultants to work as a team to a much greater extent than officials in Board A. Greater significance was given in Board B to formal planning procedures and to the implementation of the resulting plans. Board B also attached greater weight to curriculum improvement efforts in making promotions to positions of added responsibility.

Limitations

In addition to a small sample size (12 consultants), two of the inexperienced consultants had more experience than the other four. Further, any reported differences between experienced and inexperienced consultants must be seen as possibly related to how their boards viewed their respective responsibilities for program and practice. Finally, as is often the case in research that probes professionals' thinking and experience, additional interviews and more opportunities for subject feedback might have suggested more refinement in the interpretation of some findings.

Development of Interview Guide - I

In April 1987, four consultants, not involved in the formal study, agreed to be interviewed, as a group, regarding the consultant role. The purpose of the interview, tape recorded with the participants' permission, was to get an idea of the different items and experience that should be considered in interviewing consultants in the formal study. A related purpose was to get some sense of the language and concepts used by consultants in talking about their work. The interview session (with Ross and Regan) began by asking the four consultants to consider what is stated in Regulation 262, i.e., that the job of the consultant is "to assist teachers in maintaining proper standards and improving instruction." The four consultants were then asked to talk about the successes and failures they had experienced relative to this regulation. They were asked, also, to talk about what, in their view, contributed to these successes and failures. The approximately 180 minute session produced a 63 page transcript. Consultant comments in this session led to the development of an interview guide that suggested questions and probes to be used in interviewing individual consultants.

This guide was used during the summer of 1987 to interview an experienced consultant (Ross) and a teacher moving into the consulting role in September (Ross and Regan). Neither of these consultants participated in the formal study; both allowed the interview to be tape recorded. A review of the resulting transcripts indicated that with a few modifications, the interview guide developed would be appropriate for use in the study (Appendix A: Interview Guide I). It should be noted that at this point the question of a second interview with each consultant was "open" pending the results of the initial set of interviews.

Interview I

One member of the project team, Florence Maynes, interviewed each of the 12 consultants in October 1987. The interviews were tape recorded, transcribed and then read by all three members of the project team (Ross, Regan, Maynes). Each consultant subsequently received a copy of his/her interview transcript. At a meeting of the project team in November, it was decided to organize the interview data according to what consultants had said relative to a four phase model of consulting. Frequently, the literature and the consultants in the sample refer to the consulting process as involving **planning, delivery, and follow-up**. The interview data suggested a fourth important phase, **initiation**, and thus a four phase organizer was used. Each project member assumed responsibility for reviewing and reporting what the interview data revealed relative to one of the following: initiation, planning, follow-up. Everyone assumed some responsibility for reviewing and reporting relative to the **delivery** phase. In reading the transcripts, each member of the project team also prepared memos, or sets of comments, describing what were being revealed as persisting themes or patterns in the interview data. Of particular interest in this regard were any indications of what consulting activities/behaviour seemed to distinguish between experienced and inexperienced consultants. A further review of the interview data, focusing on such differences was completed by an OISE graduate assistant, D. Gates.

Examination of the consultant responses in the context of the four phase model suggested that a second interview would be useful in addressing some of the information gaps, and in clarifying some of what seem to be involved, in different phases of the consulting process. All three members of the project team suggested questions worth exploring in a second round of interviews, and a second interview guide was prepared (Appendix B: Interview Guide II). It was decided that the three team members would participate in the interviews with each person interviewing both experienced and inexperienced consultants.

Interview II

These consultant interviews were scheduled for December and January and, at a January meeting of the project team, it was decided to request an interview with a group of administrators in each of the two participating boards. It was believed that some questions emerging from, but not answered by, consultant interview data could only be answered by

administrative personnel in the respective boards. For example, how administrators perceived the consultant role, and described the expectations for this role, were seen as crucial to the task of developing a "profile" for professional development. In each board the director, the superintendent of curriculum and one area superintendent were interviewed (and tape recorded) by Florence Maynes in a group setting (Appendix D: Administrators Interview Guide). Their comments regarding expectations for growth in the consulting role are reported among the study's findings.

In analyzing consultant data from the second interviews, comparisons were made between and among pairs of consultants. An experienced and an inexperienced consultant within the same school board were paired and then compared according to how each described his/her involvement in different dimensions associated with each phase (initiation, planning, delivery, follow-up) of the four phase model. A series of hypothesized dimensions of difference were developed for each pair and tested with the transcripts of subsequent pairs. The dimensions for a given phase were derived from reflecting on consultant interview data and, at times, hypothesizing about what other behavior/activity might also be encompassed in a particular phase of the consulting process. When the comparison data for all six consultant pairs were recorded on a matrix, in accordance with dimensions representing all four phases of the model, some variations within the activity/behavior of both experienced and inexperienced consultant groups were revealed. That is, for some dimensions, experienced consultant behavior/activity was represented at different levels; the same was suggested for the behavior activity of inexperienced consultants. It was apparent, also, that a few of the dimensions identified were not useful for examining differences between most pairs of experienced and inexperienced consultants, and probably not useful in generalizing about consultant activity. However, discussion and modification of the original matrix led to clarification of the differences between experienced and inexperienced consultants as reported in Table 1.

The memos prepared by team members and the graduate assistant during analysis of both sets of interviews, suggested that there were, also, similarities among the consultants with respect to certain beliefs and practices. These perceived "similarities" were shared through some team brainstorming and later verified or modified by the graduate assistant in a further review of the transcripts. These "recurring themes" are reported with other findings in Table 2.

Development of Consultant Development Profile

This profile evolved from project team consideration of the various data analysis associated with both consultant interviews and the interviews with the two groups of school administrators. The four phase framework was affirmed as a useful organizer of the dimensions of consulting. Study data suggested, however, that planning encompasses several dimensions and that, if not a discrete phase, evaluation should at least be included with the follow-up phase.

The comparison of experienced and inexperienced consultants, as both discrete pairs and as a group of six pairs, suggested it was possible, along some dimensions, to discern developmental or motivational stages of behavior/activity. Where "gaps" occurred, and these occurred most frequently at either the lowest or the highest levels, missing levels were derived logically from existing data and the nature of the dimension being considered. What emerged was similar in many ways to stage theory in psychology, i.e., the succeeding stage incorporates the preceding one. For example, the consultant with a repertoire of skills may sometimes work alone (Level 1), sometimes work with expert teachers and other special teachers (Level 2) or work with expert teachers and school administrators (Level 3). It was clear from interviews with administrators that school board variables, particularly in the form of expectations for consultant performance and growth, needed to be accounted for in any profile concerned with consultant professional growth.

Reporting, Feedback & Revision

When the first draft of the Consultant Development Profile was completed, full-day meetings were scheduled with the consultants in each board. These meetings were designed to

include: an overview of the methods and findings of the study, presentation and discussion of the Consultant Development Profile and discussion of profile implications for in-service consultant training. The meeting in each board permitted dialogue between the three researchers and six consultants and provided feedback useful in refining the profile. For example, one refinement suggested by consultants in both boards resulted in replacing the original level designations of "novice", "apprentice", "veteran" and "expert" with, respectively, levels 1, 2, 3 and 4. The rationale for this change, accepted by the researchers, was that numbered levels better accommodate the notion that a consultant may, for a variety of reasons, work at different levels of different dimensions at a given time. Further, adopting the number designations did not violate the developmental character of the levels' structure. Other refinements to the profile, including the deletion of one dimension and the addition of another, were in response to consultant feedback.

Discussions of profile use in consultant training began in the first meeting and constituted the main thrust of the second meeting in each board. These discussions concerned the potential of certain training materials (e.g., use of the profile in analyzing "case studies" and suggesting improvements for the consultations described) and the assumptions/expectations associated with using the profile in designing in-service for consultants. With respect to the latter, it was suggested that in a given setting, certain factors would influence profile potential as a guide for in-service. These factors include the criteria employed by a board in selecting consultants and the kinds of information that a board makes available to consultants.

Further Testing of the Consultant Development Profile

Because the number and nature of the profile levels, the substance of the dimensions, and the associated activities/behaviour emerged largely from interviews with twelve consultants from two school boards, it was decided to subject these interpretations to a modest test. This test took the form of interviews with six additional consultants not involved in the formal study.

Board C was selected for the follow-up study because it was significantly different in curriculum structure than the two boards in the main data collection. Board C was a medium size board in eastern Ontario, approximately the same size as Board B with a similar complement of resource staff. Consultants in Board C reported to a superintendent of curriculum and to an area superintendent. They were appointed for limited terms (2-3 years); terms were rarely renewed but consultants might obtain a second or third appointment for different positions. The system was highly decentralized with each consultant assigned to a number of schools. Consultants were encouraged to work independently and compete for system resources.

Board C recruited three experienced and three inexperienced consultants who were willing to be interviewed. Because only one interview with each consultant was planned, the interview guide (Appendix E: Interview Guide III) combined the most useful questions/probes from the two interview guides used in the formal study. One member of the project team (Regan) interviewed each of the Board C consultants in April 1988 and, as in the formal study, the interviews were tape recorded and transcripts were prepared. Each Board C consultant also completed the questionnaire related to academic background, professional training and experience.

Only two of the six consultants in Board C proved to be as experienced as the "experienced" consultants in the formal study. These two consultants had, respectively, fourteen and four years consulting experience. Three consultants reported only one year of consulting experience with one of the three also reporting a year's experience as a vice-principal. The sixth consultant indicated two years of experience in her position as "Special Assignment Dramatic Arts teacher". Three of the six consultants reported responsibilities for "general" curriculum K-8 and three reported responsibility for Dramatic Arts, French and Language, respectively. With one exception, Board C consultants indicated some teaching experiences in other boards, but all had most of their teaching experience in Board C. All consultants had at least seven years teaching experience with three reporting more than fifteen years experience.

With respect to career gaps and/or experience in out-of-school board settings, one consultant noted some retail experience and another indicated a short-term social work position and a career gap associated with homemaking. A third consultant identified experience at the Ministry of Education and a Faculty of Education.

All six consultants described some involvement in board curriculum writing/development/planning or in-service. The extent of this involvement appears to correlate with years of teaching experience in the board.

Each Board C consultant has an undergraduate degree; none has a graduate level degree. All have at least one specialist's certificate and four indicated additional professional and academic work through Ministry of Education courses and other courses. Three consultants reported that they have completed principals' courses. Although no consultant identified any specific training for consulting, four perceive their "on the job" experience as resource teachers or "working with teachers" as useful and relevant to the consulting role.

Interview data collected from Board C consultants were analyzed with particular attention to differences that (a) "fit" existing dimensions and levels of the Consultant Development Profile, (b) suggest modifications or additions to these dimensions and levels and (c) affirm or question what were cited in the profile as dependent or board variables. The results of this analysis are reported with other study findings.

Summary

The Consultant Development Profile presents a particular interpretation and representation of the data gathered largely from school consultants with considerably less, but nevertheless significant, input from school administrators. Certainly the consulting "phase" organizer and notion of "growth scheme" are taken from literature relevant to both consulting and growth. However, the crucial features of the profile emerged from the data themselves. Further, through planned consultant/researcher dialogue for feedback purposes, and a small study involving another group of six consultants, the study built in opportunities to "test" the interpretation of the data as represented by the profile dimensions and levels.

Findings

The findings from the project will be reported in three sections. The first reports the expectations that administrators have for consultants. The second reports similarities between experienced and inexperienced consultants. The third contains the main findings: differences between experienced and inexperienced consultants.

Expectations of Administrators

The administrators in Boards A and B indicated that they have clear expectations for the type of person selected for the role of consultants. In both systems the administration looks for people who can interact and communicate well with a wide range of people. They must particularly be people who already have the ability to implement. As one put it, "the ability to have it happen in their own classroom and the ability to help somebody else have it happen in the classroom; the ability to do it and the ability to get others to do it."

Candidates selected for the jobs must also have an interest in the change process, both conceptual and practical. "They really have to be passionate about the work here--that's a little strong, but they've really got to go in and get lost in it." "They just have to be comfortable with conceptualizing because they have to interact with people who are doing that all the time. And they must be capable of taking the concept and translating it into action."

Administrators anticipate that consultants will develop in several ways in the role. Their comments sort into four areas where the potential originally identified should show real on-the-job development.

First, incumbents must gain a more sophisticated understanding of the change process and the curriculum management process. "I think it critical that they learn an understanding of the change process." "Certainly they need to learn our curriculum management process--it's comprehensive." And this includes developing a dependence on relevant frameworks and procedures. "In addition to being able to think at a conceptual level they have to operate at a high, perhaps even sophisticated level, around system procedures." As one interviewee points out, the consultant is responsible for "doing the initial analysis of the new guideline and making recommendations. That," he adds, "is a pretty formal responsibility." Another says, "The big change is... that they have a clearer sense of purpose on behalf of their job, but also on behalf of the system." He thinks this may be because their view is not confined to a single school and they can change from "being problem oriented in a pessimistic way, to problem-oriented in an analytical and positive, growth oriented way."

As noted, candidates must have demonstrated implementation skills before they are hired. But consultants, at least at the higher levels of the system hierarchy, must also play a significant role in the development and review aspects of the CRDI cycle. "They tend not to have to operate from the development mode or the implementation mode or review alone, but are able to, in a more integrated way, be working with a writing team, to be doing a needs assessment, and influencing the writing team to begin implementation."

There must then be growth in the conceptual and technical skills required for the review and development phases in particular.

The chosen candidates must have shown an ability to work with others but this should also broaden on the job, as the quote in the paragraph above suggests. Senior consultants share the development of initiatives with system administrators. In one of the systems as the plan is drafted by the coordinators and the curriculum superintendent the school support team contributes information about specific conditions in the various schools. "That interface, which is something developed more recently... has added to the planning process." There is contact with the area superintendent "so your goals tend to get integrated." "Good principals work with the consultants more than the people who don't." And as one says, "Consultants are out there delivering to demands and they've learned how to create the demand before they go."

Finally, there must be growth in the interaction of incumbents with trustees and the public. "The whole issue of dealing with administration and with trustees--it takes a bit of time to adjust to that." Or, "we put support people in the position of delivering up front" (to trustees) "and being accountable for what they've developed and what they say. And that requires a person who isn't a shrinking violet. They have to be confident in their own skills and in their personal skills at presentation."

In terms of on-the-job performance there is a definite expectation that interventions will fall within the system plan. "Now I see people being very selective about the work that they do--being very purposeful in ensuring that there is some kind of collective significance about the work that they do", because "I think we're clearer with them before they come in." A teacher's description of what he or she needs may be an entry point for the consultant "but the support person is expected to bring to that setting a system perspective and give them help that is perhaps broader than is asked for in the first place and is in keeping with the system direction and not totally in response to the initial question."

Team work is expected. "The four coordinators work along with me to develop an overall plan and they look at the various initiatives coming through their four portfolios. Then we work with the leader of the school support team who has more recently been in a school." "But anything we bring forward is a draft to be brought to the other superintendents and director." "So it's a group decision to proceed." "Yes, it's very much a team." "That's why we are bringing principals into our teams... to help them understand the... value of being collaborative and for

being analytical in this way, for having these problem-solving approaches that look for successive kinds of improvements or growth."

The consultant staff is also expected to keep up to date about relevant research and theory and to use the information in their thinking. They seek out information from a great variety of sources and "they process it to a more refined level in order to purposefully pursue their goals." In commenting on some incumbents one says, "They really did take it apart" (information) "and examine it in great detail. But I think the major achievement was in putting it back together as a whole."

There were several comments about changes over the years in what was expected from people in the consultant role. In the beginning consultants were people with subject expertise--such as art, music, history, etc.--and they would pass this on to the needy. Successful teachers were added who could share their teaching strategies. They "tended to select people who had been outstanding teachers and say, you know, you're a whiz of a teacher, go out there and help other teachers be like you." Then, "It was believed that a method of bringing about change in the system was to bring in an outstanding teacher and after a couple of years as a consultant they'd have a better understanding of system initiatives and they'd go back into the school and be change agents." "Gradually it moved from being a subject specialized role to being a planned change role." This aspect has been enlarged in these systems to the role described above.

These two boards maintain a hierarchy of consultant roles. In practice "some of the lines have tended to blend" perhaps because of the team approach that is evolving. "Now they work in the same office, they are in the same room, so it's fairly informal, so there's a blurring of roles. . . ." However, a hierarchy does emerge from the comments of the interviewees.

At the top level are the "coordinators" with management responsibilities for interventions in all phases of the CRDI cycle. They are also directly involved in developing the system initiatives and plans. "A 'coordinator' suggests initiative coming from them in a planning and management dimension, where 'consultant' might suggest responding to requests."

The "consultants" are equally involved in the planning, and carrying out of all phases of CRDI, but most of their management responsibility has to do with their own interventions--although others might be involved in them. Consultants may have subject responsibilities. A math consultant in one of the systems, for example, "follows that whole CRDI cycle through" with respect to a new guideline in his area.

"Resource" or "school support" staff are focused primarily on implementation. More of their time is spent in the schools working directly with principals and teachers. "The coordinators manage the planning, but then the school people would come in as support legs, if you will." "The two resource teachers work directly in the schools more so than the consultant" in the interviewee's geographical area of the system.

Finally there may be some in-school support staff who provide an implementation resource to their own school.

The main themes emerging from the interviews with the senior administrators in the two boards are summarized in Table 3. These themes set the context in which these consultants work.

Similarities Between Experienced and Inexperienced Consultants

Analysis of interview transcripts revealed recurring themes in the comments of the twelve consultants in the formal study. These themes addressed what can be described as principles or guidelines as well as more action-oriented considerations. We have chosen to define these themes as "strategies" because (according to our sample) they represent what the consultant must "think about" and/or "do" as he/she goes about the work of consulting.

The ten strategies identified by the majority of the consultants are listed in Table 2 with the number of consultants who "agree" with each strategy indicated. To "agree", in this context, refers to evidence that the consultant talked about the importance of the strategy. Also indicated in the Table are instances of "no comment" and "ambiguous" (i.e., the strategy was not mentioned or the value accorded the strategy was not clear) and the one instance where a consultant "disagreed" with the importance of the strategy.

Four strategies (1-4) refer particularly to the consultant's relationship with teachers; two strategies (5 and 6) refer to relationships with other change agents. The remaining four strategies (7-10) refer to specific dimensions of the planning and delivery associated with consultation.

The following elaborates the strategies identified in Table 2 with examples of direct quotes and paraphrases from consultant interviews. "E" refers to experienced consultants and "I" refers to inexperienced consultants for documentation purposes.

Relationship with Teachers

1. Consultants listen and respond to teacher needs. Only one consultant, (I), failed to mention the importance of this strategy and, in fact, suggested a different point of view with repeated references to what the consultant "wanted them (teachers)" to do in different situations. The other five inexperienced consultants referred to the importance of this strategy through such comments as, "We wanted to be able to meet the needs of as many individuals. . . as possible" (I); "We drew them (teachers) out to find out exactly what they wanted. . . (consultants) really have to listen to what teachers want" (I). All experienced consultants emphasized what one described as being prepared to listen to the teacher (E) and another expressed as a need for determining "certain things (that) teachers want" (E).

2. Teacher motivation is recognized as important for changes. All experienced consultants and three of the six inexperienced consultants talked about the importance of a motivated teacher in order to effect change. Comments of experienced consultants included the observations that "teacher interest is key" (E) and that consultants provide "in-service to motivate teachers" (E). Similar observations were made by inexperienced consultants who talked about teacher motivation: "A motivated teacher is important for change" (I) and "they (teachers) have to see a reason why" (I).

3. Consultant credibility--establishing trust--is essential in work with teachers. The five experienced and four inexperienced consultants who raised the issue of consultant credibility referred to the importance of a "trust relationship" (I) and the fact that, in relationships with teachers, "trust is the first thing (you need)" (E). What these consultants said both explicitly and implicitly about the need for "trust" is summarized in the comment, "the openness and trust and feeling, 'yes, we can work together' (is important)" (I).

4. A consultant who comes on like an expert alienates teachers. Although discussed by eight of the twelve consultants, this strategy was the least mentioned of the ten identified in Table 2. Interestingly, more inexperienced than experienced consultants made direct reference to the value of this strategy. Inexperienced consultants talked about efforts to counter or avoid the expert image: "This notion of standing up there as head honcho. . . I think I deliberately tried to move away from that perspective" (I). "I tried to establish sort of a relationship. . . as a friend as well as a consultant" (I). Two experienced consultants making direct reference to the "expert" issue suggested that the consultant must be careful ". . . not to lord it over people. . . (they) get turned off" (E), and that it's better to be "a sort of catalyst and sit down and talk" (E).

Relationships with Other Change Agents

5. The principal can be a positive force or an obstacle. Two inexperienced consultants failed to mention the principal and his/her importance. The principal as a help or hindrance to the consultant's work was mentioned by the other ten in the study sample. An inexperienced

consultant stated, "The principals are so important to a school in the way it functions. . . (schools) that have open principals that respect their teachers and value kids and curriculum. . . value my services" (I). The same sentiment is found in experienced consultant comments that "the principal has a big impact" on consultants' work (E), and "it's important that the principal be on board, always" (E). Conversely, a principal can be an "obstacle" when he invites a consultant "in" without "negotiating" the meeting with teachers (E and I).

6. *Consultants identify expert teachers and use networks of expert teachers in achieving some of their consulting objectives.* All experienced consultants and four inexperienced consultants talked about establishing and using networks of teachers. Experienced consultants refer to "bringing in teachers" (E) and using "teams of teachers" (E) in different situations: ". . . where I'm running a workshop, I usually involve a couple of people from various schools in the planning committee" (E); "I have some teachers I bring in and we write curriculum and (they) do workshops for me" (E). Similarly, inexperienced consultants commented, "Planning is done with a group of key teachers" (I); "I say to them (teachers) if you have some people. . . that have expertise, we need some volunteers" (I).

Planning and Delivery

7. *It is important for the consultant to share the same agenda as his/her clients.* Only one consultant, (I), failed to mention this strategy as an important one for consultants. Experienced consultant comments include those describing how to get a shared agenda and the problem of not having such an agenda: "I tend to hold off the group meeting until I get enough feeling from the field that there are people who have identified their need to know" (E); (the meeting was not effective) ". . . because it wasn't coming from them. . . it was coming from somebody up there (before the group)" (E). Comments from inexperienced consultants show the same concern for an agenda reflecting teachers' interests and needs: "I asked a lot of questions to establish exactly what they wanted" (I); (the consultant) works from "their agenda mostly. . . I am responding to a particular need they have" (I).

8. *Large group sessions are good for efficient presentation of new information.* With the exception of an ambiguous comment, (E), consultant statements reveal a shared view of the purpose and potential of large group sessions. Consultants' comments include: "I think the large group meetings (are) for situations where you have to get information out to the whole group at once" (E); when "there is a new program, new Ministry expectations, then obviously you want your teachers to be aware of what the expectation is" (I). Likewise, the experienced consultant comment that, in large groups, ". . . you get (the) aspect of everybody learning the same thing" (E) is echoed in the inexperienced consultant comment that, in large group sessions "you want to get the sense. . . 'hey, we are all moving in the same direction'" (I).

9. *One shot workshops are not effective.* All inexperienced consultants talked about the limitations of one shot workshops with such comments as, "I don't believe a one shot workshop effects change" (I) and "Obviously, when you just give a whole group presentation and leave. . . you are not very effective" (I). Three of the four experienced consultants appearing to endorse this strategy, commented on the need for a "sequence of workshops" with "follow up" (E). Such comments are interpreted as implying what is stated candidly by the fourth experienced consultant, "One (shot) sessions are useless" (E).

10. *Important practical how-to information can be provided for teachers through sharing and hands-on activities.* Only one consultant, (E), failed to mention this strategy as important. A comment from one experienced consultant summarizes what most consultants believe, i.e., "There are many different strategies you can use for workshops and they're all hands-on" (E). Other experienced consultants' comments refer to a workshop that involved examining samples of children's writing (E) and one where "(we) got the children in and the group tried (a specific approach) with real kids" (E). Inexperienced consultants' comments include a description of a group meeting at which teachers spend ". . . 90% of their time sharing, sharing resources, sharing how do you do this, and how do you go about doing that" (I); and the notion of "let's have teachers sharing their expertise" in group meetings (I).

Summary

Although the consultant sample is too small to support generalizations from these findings, the data suggest some questions for further study. Interestingly, for example, of the four strategies identified by eleven of the twelve consultants, two (1 and 7) bear directly on consultant concern for responding and accommodating to teacher needs. In the context of other findings, the support for these strategies raises questions of how teacher needs are determined, particularly in relation to system needs. As indicated in Table 2, failure to mention a strategy was more frequent among inexperienced consultants as a group. This may suggest something about what is, in fact, learned through experience "on the job". Exploring the effects of experience is suggested, also, by the fact that the pattern of support for strategies related to relationships with teachers and other change agents was more consistent for experienced than inexperienced consultants. Further, because the ten strategies identified in Table 2 were considered important by the majority of the consultants in the sample, the verification of these strategies, and their importance, with other consultant groups is in order.

Differences Between Experienced and Inexperienced Consultants

There were 17 significant differences between experienced and inexperienced consultants. These are listed in Table 1. The first column in the table briefly describes the differences. Subsequent columns indicate for each pair of experienced and inexperienced consultants whether the differences were large (marked with a check mark), small, or nonexistent (marked NS). In some instances there were insufficient data to determine whether there were differences; these were also marked NS. There were no instances of reversals; that is, contrasts in which the difference between experienced and inexperienced consultants was in the opposite direction to that found in the rest of the sample. The differences have been arranged in terms of the four phases of the consulting process: initiation, planning, delivery and follow-up.

Initiation of Consultation

This phase of the consultation process involves the ways in which consulting might begin. In our account it also involves broader issues about the scope of the consultant's role. There were differences in four areas. These differences tended to be large and were consistently maintained across all six pairs.

Item 1: Source of Initiative

For the experienced consultants curriculum plans developed at the system level provided direction for their activities. Every experienced consultant provided a detailed description of a system level curriculum change process. In most instances the system curriculum plans were developed with heavy involvement of the experienced consultants, in collaboration with supervisory officers or system curriculum structures. The specific details of the plans varied between programs and between the boards. But in every case the plan provided the agenda for consultation. For example, when one experienced consultant was asked who determines the focus of workshops or in-service work with teachers she responded

That really originates from the Director. Each year he articulates the priorities for the year and we have picked up on that in Curriculum Services and now provide what we call a Curriculum Planning Guide which outlines the expectations by division for each area. We have some initiatives that are Board-wide, elementary and secondary, such as affirmative action, computers in the school, safety. . . then there are priority areas for each curriculum areas such as environmental studies, writing, math, etc. our workshops are geared directly to the initiatives that are outlined in the Curriculum Planning Guide.

In addition to the initiatives that they planned in response to the system plan, experienced consultants also responded to requests from principals, groups of teachers and less frequently, to requests from individual teachers. Experienced consultants viewed these requests in the context of the system plan and felt free to decline requests or give a very brief response to those which deviated from the system thrusts.

We don't feel obligated to respond to the whims of principals when they don't particularly fit into the initiatives. If we get that kind of request we may meet with the principal and try to put it into a different context.

In contrast inexperienced consultants reported that the initiative for consultation came from a wide variety of sources, such as requests from teachers (individuals or groups), principals and more senior consultants or from the consultant's personal agenda. Inexperienced consultants tended to respond to these requests in an ad hoc manner without overt reference to system based curriculum improvement plans. The inexperienced consultants were aware that such plans existed and may have been aware that the requests they were receiving were derived from these plans; the difference was that the plan was not explicitly considered in day to day decision making. This difference was maintained in all six pairs of consultants, with the exception of pair 4 in which both derived their initiatives from a system plan but the experienced consultant had a much more complex understanding of its dimensions.

Item 2: Who is Involved in Providing Consultation

Experienced consultants tended to work with a team in all phases of their work. These teams were complex networks that involved the consultant with expert teachers, principals and other consultants in the planning, delivery and/or follow up of workshops and one to one consultation. One experienced consultant reported planning a workshop series with a team of 20 people. In contrast the inexperienced consultants tended to work alone or with very small teams consisting of the consultant with a few expert teachers. The contrast between the consultants was clearer in Board A than in Board B. In Board B the differences were smaller. In two of the contrasts (pairs 4 & 5) the experienced consultants worked with large teams containing representatives of several roles. The inexperienced worked very closely with principals. In these cases the inexperienced consultants tended to work at the direction of the principal as opposed to collegially. In the last contrast in Board B the experienced consultant worked with a large and diverse team; the inexperienced worked mainly with department heads.

Item 3: Who is Given Help

Experienced consultants provided in-service to a variety of roles beyond the teacher. For example, they met with parents and members of the public (e.g., nurses) to explain school system thrusts. They made presentations to trustees. They also gave workshops to principals, and rarely to supervisory officers. In contrast, inexperienced consultants tended to provide in-service to teachers only, or in one instance to department heads instead of teachers. Some of the inexperienced consultants had a great deal of contact with principals as gatekeepers: for example, they negotiated the terms of one to one consultation with the principal prior to entry into the school. But none of the inexperienced consultants reported an activity in which principals (individually or as a group) served as the consultees (although one inexperienced consultant reported that she had plans to do so).

Item 4: Which Phases of the CRDI Cycle Involve the Consultant

A further difference between experienced and inexperienced consultants observed in the interview data concerned the number of phases of the CRDI cycle in which the consultant played a role. With one exception (in pair 1), the experienced consultants reported substantial development responsibilities in addition to their implementation functions. These development responsibilities were shared with expert teachers but the roles were clear:

We have writing teams. . . I rely heavily on their expertise, so they are the experts in many of the cases. I'm the manager and can give them guidelines and suggestions knowing what the system expects, the system's expectation, the Ministry expectations.

The differences were smaller in Board B. In pair 5 for example both consultants had a development role but the experienced consultant's was much more extensive; in fact the development tasks of the inexperienced consultant were assigned by the experienced consultant from her own extensive portfolio. In pair 6 the inexperienced consultant was also involved in some curriculum writing activities but to a much lesser extent than the experienced consultant.

Planning

Almost half of all the differences between the consultants were observed in the planning phase. These differences varied in size and were not always consistently maintained.

Item 5: Defining Needs

The first set of differences concern the objective setting phase of consultation. Experienced consultants used the system plan to identify needs to be addressed in a workshop or in one to one consultation: "there's a plan. . . you try to get them to plug into the plan and then if they move to grade 5 [or] down to grade 2, then you look at the plan and say, all right, I have to expand this, I should be doing more of that. . . ." The plan might specify the specific objectives to be followed or there might be an interaction between the plan's intentions and input from teachers. For example one experienced consultant described how objectives were set for a series of workshops: The teachers were put in small groups and

. . . they were interacting about all the components of Whole Language. . . then another primary consultant from the team and I sat down and took the levels of use profile titles. . . . We went through the raw data that we had collected from these people in their brainstorming sessions and we summarized everything that they had. . . by doing that we were able to identify certain gaps and we found that, for example, they hadn't dealt very much with looking at the environment. . . . Immediately the gaps started to show. Things they hadn't considered in relation to each component and basically the gaps tend to be fairly similar throughout. So I sent them each a copy of this and at our next meeting which is next Tuesday we are going to work at closing the gaps.

In contrast the inexperienced consultants reported that the objectives for their activities were derived from their own personal agendas or their knowledge of teachers or the expressed needs of consultees without overt reference to a system curriculum plan. For example, one inexperienced consultant reported that "the way I feel that I do things, I have to know people. . . I would find it difficult if it was a very, very large board, I think that, with hundreds of teachers, then I don't know what I would do." Another inexperienced consultant indicated that his workshops replicate a provincial in-service program containing specific objectives: "It's quite a program. Very prescriptive, pedagogy outstanding; it's very tight. . . . The activities are well researched. Student objectives. The material is very easy to follow."

The differences were smaller in Board B. For example, in pair 5 both consultants were aware of the system plan and the experienced consultant used it to set objectives for consultation; it was much less clear how the inexperienced consultant used the plan. In pair 4 both consultants worked from a system plan, although the experienced consultant was more likely to get feedback from a broad range of people on the link between the plan and workshop objectives.

Item 6: Searching for Data on Needs

Experienced consultants had a wider search for data on teacher needs (or teacher behaviour) during the objective setting process. This search for accurate data was most visible in one to one interactions. For example,

... usually before you go in you have a good idea of what the teacher would like you to do, so you do some phoning before hand. . .there's your initial contact, you think about it, you phone back and talk some more. You also talk to the principal. That way everybody is brought on board and then you go in and you can help the teacher a little bit more because you have more information.

Conversations with teacher and principal would typically be supplemented with observational data collected by the consultant or the principal to diagnose the specific needs more precisely. Experienced consultants were also more likely to search for data when providing consultation to groups of teachers, for example, by having samples of student writing collected prior to the consultant's visit.

In contrast the inexperienced consultants employed narrower search procedures. Typically they would talk to the teacher involved in the one to one interaction; they tended to accept the teacher's definition of the need as is rather than treating the consultee's expressed need as one piece of information to be added to others. Inexperienced consultants tended not to confer extensively with others, although the inexperienced consultant in pair 5 tended to obtain additional data on teacher needs from the principal. Differences were smaller in Board B.

There was a slight tendency (not reported in the table) for experienced consultants to use explicit as opposed to intuitive procedures for obtaining data on teacher needs. The slight difference was not consistently observed across the sample.

Item 7: Planning Workshops in Series

The final difference in setting objectives during the planning phase involved the scope of planning. All the experienced consultants had planned series of workshops. These series took different forms. For example, one experienced consultant planned 5 different workshops to occur simultaneously on a professional activity day: these workshops pursued the same themes but were differentiated in terms of grade level and topic. Other patterns involved providing a cumulative series of events for the same audience or repeating the same workshop, with slight variations, for different audiences or providing integrated sequences in which cumulative activities of one group (e.g., teachers) were coordinated with a cumulative series for a second group (e.g., principals). In contrast the inexperienced tended to offer single event consultations. The differences were smaller in Board A; the inexperienced consultants in pairs 1 and 2 reported that they intended to plan a workshop series sometime in the future, even though they had not yet done so.

Item 8: Responding to Requests for Individual Consultation

When planning strategies for one to one consultation the experienced consultants tended to arrange a series of interactions rather than a single episode. These interactions typically entailed a three step response to requests for assistance. First the consultant made an appraisal of the situation based on talking to the teacher, input from the principal and the consultant's observation of the teacher interacting with students. This appraisal would be shared with the teacher and specific objectives identified. Then the teacher and the consultant would do some lesson planning together. Team teaching would follow, usually with the consultant modelling the initial lessons and gradually increasing the teacher's role. The teacher would likely be debriefed after each lesson. The final step would involve a follow up period of practice with feedback.

Inexperienced consultants were more likely to respond to requests for assistance with a single event response that was pure delivery. The consultant would model the desired behaviour or would provide materials describing what the teacher should do. There were exceptions: both the inexperienced consultants in pairs 2 and 4 followed a three part planning-delivery-follow up model that was very similar to that of the experienced consultants.

Item 9: Use of Teacher Profiles

There was one difference between the consultants in terms of their use of teacher profiles in planning consultation. The experienced consultants tended to use more complex profiles containing many dimensions with several levels of performance on each. In contrast the inexperienced tended to use much simpler schemes consisting of a few levels on a single dimension. This difference was observed in only half the pairs. There were no differences in the remainder of the sample. Both experienced and inexperienced consultants in pairs 1 and 3 used simple uni-dimensional profiles; both consultants in pair 4 were aware that a complex scheme had been produced in the board but they preferred to use a much simpler scheme in day to day planning.

Item 10: Accommodating Different Needs Within the Same Workshop

There were several differences in planning strategies for introducing new ideas and practices to the consultees. The most consistent difference concerned the attention given to variations in teacher needs. Experienced consultants used a variety of strategies to accommodate a range of needs within a single workshop or would offer separate workshops for each major type of need. One strategy involved group work:

...differentiating actually in the workshop itself where one person might take one group off and do one particular thing and somebody else take another group, because we know the needs are different.

Another involved giving different resources to different individuals; for example,

You've got to go back to the other question about the level of the, the teaching ability. If I know the personalities then I may already know of some things that I should go in with and I would do that, either take material in or have sources identified for them. If we get a mix, again because of the spread of teachers and you take people who have written the textbooks, they have a wide knowledge of resources. . . . Of course I always have more than one agenda.

Or it might involve a main message with asides for those not ready for the main message.

When we write our curriculum and when we do our presentations, sure we are going to try to meet the needs of the people [to bring them to] the highest level. But we also want to catch a lot these people in here [pointing to the profile]. . . for example, I would say, "OK if you are using a basal reader and you're using it with round robin groups, or you're just using workbooks for follow-up, here are two or three other things that you could do that wouldn't mean a lot of work. You could implement them in the next couple of days." So, I guess we are aiming at getting here [pointing], but not overwhelming these people who are lower.

Or it might involve different types of experiences to accommodate consultees with different learning styles: lecture, demonstration, sharing, distribution of materials, audio and visual presentations--all within the same workshop. Or it might involve separate experiences for different groups in separate sessions. For example an experienced art consultant reported that he provides very concrete experiences, following a detailed procedure, for teachers fearful of the art curriculum; for the talented art teacher he provides a less structured approach that

extends their interests to other domains or deepens their competence in the medium which is of greatest interest to them.

In contrast inexperienced consultants did not report strategies for attempting to meet the varying needs that exist in a diverse group of teachers. Only one strategy was reported by an inexperienced consultant:

...you always have such a wide range of levels of awareness and program. I guess I'm trying to spark awareness in those people, so I present that. But I also want to provide some support for the people that are already doing the program; that's why a lot of the materials there [are] for the people looking for something they can use.

Item 11: Practice Within the Workshop

There were some differences in terms of assigning practice activities to consolidate new ideas that had been introduced. The differences were not consistently maintained across the sample.

Three of the experienced consultants reported that they assigned tasks within the workshop setting that were much closer to the classroom behaviour to be learned than the practice tasks assigned by the inexperienced consultants. For example, for a workshop in learning how to "co-plan" with students:

The third step of our presentation was to bring in students and assign a student to each teacher. The teacher was comfortable because it was his or her own subject field, but the student had picked a topic of interest and together they started to try to co-plan what it was they were going to do. . .we moved around to try to be, well, facilitators or coaches or whatever you want to call it. Trying to listen in on what was going on between the teacher and the kid and try to provide some feedback in that direction.

Another experienced consultant had teachers work with the same art materials that the students would be using. Yet another had teachers simulate teaching by teaching other teachers or developing lesson plans in small groups.

In contrast none of the inexperienced consultants reported providing practice opportunities in workshop settings of such direct relevance to the task to be learned. The few inexperienced consultants who used peer coaching strategies did so as a way of delivering new ideas, not as a consolidation strategy.

Item 12: Practice within Individual Consultation

In providing one to one consultation, the experienced consultants were more likely than inexperienced consultants to schedule classroom practice in which the teacher would receive some kind of feedback on his or her performance. The differences were larger in Board A than in Board B. For example, one experienced consultant provided teachers with a general procedure for teaching children how to plan an artistic composition; he also provided a schedule for introducing this procedure to the students:

I'll quickly demonstrate how that will work and set up some timelines. The first time. . .have sort of a chance for motivation, first to get some verbal input, to get some ideas going, some mental images. And then you suggest, in grade 7, have the child tell you six things that are going to be in the picture, and start with the most important. . .have them start their own plan. . .and then that might be the end of Day 1. Day 2, then you start to get rid of the important things in the picture and work towards the centre of interest. And the children know

exactly where they are going. They have a formula for doing it and yet you're not impinging on the content. . .they're still open and free.

The teacher's implementation of the assigned activities would be observed by the consultant and/or principal in subsequent visits to the school.

The inexperienced consultants were less likely to provide practice with feedback in one to one consultation, although some did so using a similar format to that of the experienced consultants. For example, one inexperienced consultant reported that she scheduled three in-class sessions with teachers in one to one consultation. In the first the consultant observed the teacher; in the second she modelled for the teacher; in the third the consultant observed the teacher implementing a jointly developed plan.

Move in for the third time, if appropriate, probably will be, do whatever you had decided or planned to do, take it from there. If you need another one, another thing might be. . .want to mess around with [it] on your own time without my being there? . . . OK I'll come back X number of weeks later. . . . In the meantime, the principal, if that's been part of the understanding of the entire situation, can feel perfectly free to nip in and see how things are progressing.

What planning of practice by inexperienced consultants there was in one to one consultation tended to be limited to the less able teachers. More capable teachers would be given a less structured approach that would not involve modelling or practice with feedback but might involve some team teaching.

Item 13: Practice Outside the Workshop Setting

When providing consultation to groups of teachers, the experienced consultants were more likely to assign practice activities outside the workshop setting. For example,

. . .following [the workshop], the follow up to try to find out, and I suppose we always fall down on follow up, to find out who has tried it and what has happened to it. What worked when they went back and tried it.

In contrast the inexperienced consultants, with the exceptions noted in the table, were less likely to assign tasks that would involve teachers practicing the ideas presented in the workshop in their own classes.

Item 14: Sequencing Practice

There were two instances in which experienced consultants attempted to sequence the practice activities of teachers subsequent to a workshop or one to one consultation. The purpose of the sequencing was to reduce demands on teachers as they acquired the new teaching skill. One experienced consultant reported that after modelling a whole class art lesson,

. . .realizing that that teacher probably would still have a lot difficulty in doing this with a group of 25 or 30 students, [I] suggested she use a centre approach. Then I went back. . .I was able to first of all, get over the initial hump, have something effective happen. . .and leave her with something she felt comfortable with. And she could have 4 or 5 working back there and keep a close eye on what they were doing.

The same consultant reported that subsequent interventions with the teacher would gradually increase the complexity and the messiness of the art materials used. He also recommended that the teacher "try it at home first or after school".

The strategy of reducing demands on teachers and providing low risk practice opportunities did not appear frequently in the data, although there was a great deal of concern with putting teachers at ease. (Putting teachers at ease relates to reducing the threat of trying out new ideas, although it was usually mentioned in the context of establishing a trusting atmosphere that would encourage frank expressions of teacher needs.) None of the inexperienced consultants talked about sequencing practice.

Delivery

Item 15: Response to Consultee Feedback

In our account delivery refers to the adjustment of intentions as the plans for a group or individual consultation are implemented. There was one consistent difference: Experienced consultants made more substantial adjustments to their plans on the basis of feedback from consultees. One experienced consultant reported that an outside speaker completely flopped so he took over the session and worked with the audience to find ways in which the speaker's materials could be used effectively. The same consultant indicated that "I wouldn't go in with a rigid view of what I had to come out with. As long as I see some development, some growth, then I'm quite happy." This willingness to change objectives during the delivery phase was shared by other experienced consultants. For example,

You find people asking questions that indicate they are at a much higher level than you anticipated. And if you've got a good handle on your material you can adapt very easily. . . the workshop just changed gears because we've got a pretty good handle on where things are. It wasn't a problem for us.

Such flexibility was reflected in the comments of other experienced consultants who were quick to terminate activities which were not working well or to replace materials that are found to be inappropriate.

Inexperienced consultants reported modest adjustments, if they adjusted at all. For example, one inexperienced consultant reported that if she discovers that some individual needs are not being met in a large group consultation she would attempt to meet this need outside the workshop setting. Inexperienced consultants reported making adjustments in one to one consultations, (as did the experienced consultants).

Follow-Up and Evaluation

Item 16: Use of Teacher Reporting

There were two important differences in the follow up and evaluation phases. Experienced consultants arranged for teachers to report on their attempts to implement new ideas. The reporting activities took a number of forms. For example, the teacher might be encouraged to report to other teachers in a follow up workshop or at an in-school or family of schools meeting. The teacher might also be asked to report to a principal in a self-appraisal session or the consultant might serve as a listener. These reporting sessions were planned in advance; the teachers typically knew that they would be called upon or given an opportunity to share their experiences. These sessions were seen as motivational devices: for example, having teachers display examples of student work that were produced by implementing the consultant's recommendations gives teachers a "great boost". These reporting sessions also improved the likelihood that teachers would put consultant ideas into practice; noncompliance would be visible. Furthermore explaining things to others was seen as a good way to consolidate one's own knowledge. It was also a way of communicating to other teachers the benefits of the innovation: they provided testimonials from satisfied users.

Inexperienced consultants were much less likely to have teachers report on their implementation efforts to others. Some inexperienced consultants did encourage sharing of new ideas in their workshops but this sharing tended to be limited to the more accomplished

teachers. It was a way to introduce to the workshop new ideas which were most likely unknown to the consultant. The notion of sharing as an aid to implementation was not part of the inexperienced consultant's repertoire.

These differences were not consistently maintained across the sample. In pair 3 neither consultant used a reporting strategy; in pairs 5 and 6 the differences were small with both consultants using presentations by expert teachers in their workshops.

Item 17: Sources of Evaluation Data

Experienced consultants reported various ways of finding out if the new ideas were actually being implemented after a workshop; these included meetings for teachers to share their experiences, keeping track of requests for materials required by the program, in-school observations, submissions from teachers to newsletters, requests for additional input, etc. Subsequent activities would be designed in response to how the assigned practice went.

It could be another session. Building on the one we'd done prior to that. It could be meeting with small groups from the staff as opposed to a whole staff. It could be going to the school to spend the day there within and out of classroom. . . . Sometimes we've had informal sessions here from 4:30 to 7:00 where it's a voluntary kind of thing for people who [are] interested in pursuing it in a little less structured fashion. . . . It really varies. It might look like asking one of the school support teams to come in.

In contrast inexperienced consultants obtained less data on the effectiveness of the consultation and they tended to be more concerned with how satisfied teachers were with the consultant's input than with obtaining information on the extent to which teachers had changed. It was not clear how the inexperienced consultants used the data they obtained, if they used it at all, in revising consultation strategies or in setting new objectives for subsequent interventions.

Discussion of Findings: Development of the Profile

The main finding from the study is that there were differences in the strategies used by experienced and inexperienced consultants which seemed to be consistently maintained over a series of different contexts--i.e., different consulting tasks in different boards. Examination of these differences suggests that the experienced consultants can be viewed as experts. Previous research (e.g., Bereiter & Scardamalia, 1986; Berliner, 1986; Leithwood & Stager, 1987) indicates that educational experts share certain characteristics that distinguish their behaviour from that of novices.

Experts have different knowledge structures than novices: Their knowledge structures are larger and they are organized in different ways. In terms of amount of knowledge, the experienced consultants in our sample knew more about the amount of effort required to bring about change and the specific strategies for doing so. In contrast with their inexperienced peers, the experienced consultants arranged for a series of interactions with individuals (item 7) and groups (item 8). They also assigned practice tasks to individuals (item 12) and groups, either within the workshop (item 13) or outside it (item 14). In addition the experienced consultants sequenced practice over a series of activities (item 14). Each of these strategies is based on one of the most strongly supported findings about the change process: redundant encounters with the behaviour to be learned over extended time frames are necessary for enduring teacher change. In terms of the way in which knowledge is organized, there is some evidence that experienced consultants represent problems differently than the inexperienced. Experienced consultants derive the initiative for action from a system plan (item 1) and use this plan to identify the specific needs to be addressed (item 5). They also have a much more sophisticated category scheme for classifying teachers (item 9).

Experts have more complex skill structures than novices: They are more flexible in their processing; they are able to handle more data, and they are more conscious of the effectiveness of their strategies. The experienced consultants in the sample demonstrated greater processing flexibility in their response to consultee feedback (item 15) and in their ability to accommodate different needs in a single workshop (item 10) than did the inexperienced. Experienced consultants also showed that they were able to handle more information by using more extensive search procedures to obtain data on consultee needs (item 6). Finally, experienced consultants had more elaborate ways of determining the effects of their interventions (item 17).

Experts are simultaneously sensitive to the task demands and to the social structure of the job situation; novices are not. The experienced consultants demonstrated a sensitivity to the social context through their networking and team building activities. Experienced consultants, to a greater extent than the inexperienced, addressed the needs of a broad array of school system roles (item 3) and involved other agents in the delivery and monitoring of consultation (item 2). They also used teachers reporting to others as a technique for consolidating learning from consultation (item 16).

A second important finding emerging from this study is that the characteristics that distinguished experienced from inexperienced consultants concerned the overt strategies they used to bring about change. There was little evidence that the crude quantitative measures (amount of consulting or time spent) identified in previous studies distinguished the behaviour of the experienced from the inexperienced. Similarly the attention given in the literature to the importance of personal attributes was not confirmed. It may be that there was very little variation across our sample on these personal variables: for example, the importance of interpersonal skills was so well known that it may have been a necessary condition for selection to the role. The practical value of focussing on differences in overt strategies (as opposed to tacit knowledge or personal attributes) is that strategies are teachable.

A third finding concerned the interplay of individual achievement with the support/constraint provided by the school system. There was evidence that the tactics and executive strategies of the consultants in our sample were deeply affected by their specific job descriptions and the institutional contexts in which they worked, as predicted for example by Miles, et al. (1988). System plans, networking within teams of consultants and coordinated support between line and staff positions were key elements in the strategic planning of the experienced consultants. Since all of these elements are largely beyond the control of the individual consultant, the potential for superlative performance is greatly diminished in unenlightened school systems. But we are more sanguine than Fullan (1981) and Fullan, Anderson & Newton (1986) who argue that the effectiveness of consultants is dependent upon the emergence of an enabling institutional context. Many of the differences between experienced and inexperienced consultants we found (e.g., with regard to the provision of practice and follow-up) are within the control of individuals. It is more difficult to perform these activities in an unsupportive environment but it is possible: there is a place for the heroic consultant.

The findings from this investigation are limited in several ways. The data were derived from only three boards, two of which were probably significantly more advanced in curriculum organization than other school systems in the province. The differences in strategies were identified from self reports rather than observation. And we don't know what portion of the differences should be attributed to selection as opposed to growth in the role.

Despite these caveats the discovery of consistent differences between experienced and inexperienced consultants suggests that the strategies of individuals develop in the role. In reporting the findings we noted that there were variations within the categories of experienced and inexperienced. We have attempted to capture these variations in the profile of consultant strategies in Table 4. The profile reflects the feedback received from the consultants in the main sample (Boards A and B), as well as the interview data from the consultants in the subsidiary sample (Board C). The profile is a simplification of reality in that it collapses some elements and expressed the differences more generally as dimensions of behaviour. Four levels have been described as incremental teachable steps toward the desired behaviour. Although

most of the levels reported in the table were observed in the interview data, the distinctions between them have been sharpened.

Implications of the Research: In-service for Consultants

The consultants and administrators in the three boards of this study reported that there were very few in-service opportunities for consultants. Fullan et al. (1986) found a similar situation in the four boards that they examined.

A few systematic attempts to provide in-service for consultants have been reported. Louis & Kell (1981) found that training, which was focussed largely on the knowledge domain, had very little effect on consultant behaviour. The successful efforts (Goodwin & Coates, 1973; Griffin & Barnes, 1986; Miles, et al. 1988) combine knowledge acquisition with heavy emphasis on skill development. The importance of combining both elements has also been a theme in in-service programs designed for other roles. For example, Roehler, Duffy, Herrmann, Conley & Johnson (1988) found that a program for preservice teachers that consisted of adding to teachers' knowledge structures could overburden the recipients and lead to poorly organized ("cluttered") structures. Clark (1988) found that in-service programs which stimulate teachers to reflect on their practices had a positive impact on teacher development. Schon (1987) has described an elaborate process through which novice practitioners develop their competencies by reflectively interacting with masters.

Schon proposes a practicum in which novices develop their competencies by addressing typical problems in a series of virtual worlds. These virtual worlds are low risk practice environments in which learners can frame problems and conduct experiments to work out the implications of their frames. Problems are reduced to their essential constituents in the virtual world; constraints on experimentation have been removed. Although Schon is concerned with the development of tacit knowledge for dealing with "swampy" problems, (i.e., important issues which cannot be solved through routine procedures), his prescriptions for designing in-service training have broad application.

The in-service program developed in the current project is based on the conviction that effective in-service is tightly linked to the day to day job responsibilities of practitioners and that reflection on typical cases provides the stimulus for change. It also assumes that collaborative learning in teams is preferable to other methods and that incremental adjustments to current practices is more likely to have an impact.

Training implications derive from the consultant development profile, consultant responses to the professional background questionnaire, and feedback in the reporting-feedback sessions with consultant groups. Consideration of data from these sources resulted in the design of three training alternatives. Each of these alternatives is discussed in this section of the report. Before considering the specifics of these alternatives, however, it is necessary to identify what we see as "preconditions" associated with all three alternatives. These preconditions, also suggested by the study data, are best viewed as what is required to "set the stage" for the implementation of the training alternatives.

Preconditions

In addition to defining consulting strategies, the Consultant Development Profile indicates points at which board variables influence use of particular strategies. Chief among these variables are the system goals/priorities that have been identified and the specific responsibilities assigned to different consultants. The opportunity for a consultant to plan his/her work in ways that support a system plan depends, obviously, on the existence of such a plan and on how well this plan is articulated. Similarly the potential impact of a consultant's work may be defined (and perhaps constrained) by the way in which the board assigns responsibilities. Assignment to a single school, or group of schools, to support implementation of a particular program or practice may limit the kinds of consultant intervention possible. We see such variables having an impact on training just as they impact on practice.

As the Profile illustrates, consultant growth is determined, in large measure, by the kind of systematic planning, delivery and evaluation that views a given consultation as part of a coherent effort to effect change in the direction articulated by the board. Therefore we see, as a precondition for effective training, consultant understanding of both system goals and how these goals relate to his/her assigned responsibilities.

Comments from consultants regarding features of consultant training revealed general agreement about the importance, in consulting, of interpersonal skills. In some instances, mention of these skills was tied to comments supporting the need for consultants to be able to get together and share some of their concerns. We see these comments as defining two preconditions for the training alternatives proposed. Certainly interpersonal skills are essential in consulting and so essential, in fact, that, in our view, they should be among the selection criteria employed in making consultant appointments. In other words, appointment to a consultant position should imply having the necessary interpersonal skills for the job. With respect to the expressed need for consultants to "get together", we see this kind of sharing, and the reinforcement associated with such meetings, as establishing readiness for the kind of training we propose.

Alternatives

What distinguishes each training alternative is the degree of board commitment and the corresponding researcher-trainer involvement associated with that alternative. Board commitment in this context refers to the commitment of both administration and the consultants involved in the training. For the purposes of this discussion, the alternatives are numbered and labelled as follows: Alternative I: General-Information Sharing, Alternative II: Four Session Package-Personal Growth, Alternative III: Extended Training and Evaluation: Growth Toward Board Objectives.

In the descriptions of alternatives, reference is made to the Case Studies-Profile Dimensions packages (See Table 5 for an example). These packages will accommodate to different training procedures depending on the depth of training associated with the particular alternative. The researcher-trainer designations refer to the Research Team in the present study.

Alternative I: General - Information Sharing

The purpose of this alternative is to share study findings, particularly the consultant Development Profile, with consultants (and, perhaps, administrators) in boards interested in this kind of input to their own professional development plans. This alternative is designed as a full-day session with researcher-trainers. The session is structured to include fairly straightforward reporting of study findings and engaging participants in a task (from a Case Studies-Profile Dimensions package) that suggests how the Profile can serve as a vehicle for training.

Boards (or professional groups) interested in this alternative must insure that participants are released from other commitments for a full day. Boards should also initiate some discussion, by consultants, of system goals or plans prior to the full day session with researcher-trainers. Also recommended is some prior opportunity for consultants to share particular concerns related to their professional responsibilities.

Alternative II: Four Session Package - Personal Growth

The purpose of this alternative is to provide training for consultants who are interested in improving their consulting strategies and who have board support for this undertaking. Essentially this alternative is founded on a planned program of group sharing, individual practice, and self-evaluation. It involves, in essence, a personal plan for professional growth.

This program requires four full day sessions with researcher-trainers, with sessions scheduled at least a month apart.

The first session is designed to engage participants in a Case Studies-Profile Dimensions task involving analyzing, improving, and comparing strategies through group sharing and, then, through activities involving the set of Profile dimensions selected for this session. The researcher-trainers monitor group activities and provide guidance, clarify the task and the like as warranted. These activities are then extended to include: (1) individual reflection on a past consulting experience relevant to the Profile dimensions being considered and (2) identification of a better strategy (or set of strategies) that could have made the consultation more effective. Plans, including specific opportunities for practicing the "better" strategy (strategies), are developed by each consultant with feedback provided by the researcher-trainers. Consultants are expected to include in their plans some indication of how they will assess their growth in relation to their plan objectives.

The second session (and both session three and four) begins with consultants sharing their experiences relative to the action plans designed in the previous session. Depending on how the consultants and researcher-trainers evaluate the experiences, a decision is made regarding the next step in training. One option is to repeat the procedures of the previous session focusing on tasks and activities concerned with another set of Profile dimensions. Another option is to recycle the Profile dimensions from the previous session through the consultants' own practice and evaluation experiences. A third option is to combine some recycling with the introduction of a "new" set of dimensions. All three options require participants to develop an action plan, including practice opportunities, to implement and evaluate before sessions three and four.

Boards interested in providing this training experience for all, or some, of their consultants must be prepared to approve four full days of released time for participating consultants and be prepared to allow any adjustments to consultant workload necessary to enable practice activities to go forward. Participating consultants must also make a commitment to the time and tasks involved in the training. Interested boards should also insure that participating consultants are aware of system goals/priorities and any system plan for change. It is recommended further that consultants participating in this training have an opportunity to meet and share particular concerns prior to the training outlined for this alternative.

Alternative III: Extended Training and Evaluation - Growth Toward Board Objectives

The purpose of this alternative is to provide, monitor and systematically evaluate training that focuses on consultant professional development in relation to a specific board goal or direction. This alternative requires a high level of board commitment. This commitment ranges from involvement in identifying the goal or direction at the centre of training to the time and resources associated with "released time" for participants and evaluation activities.

Because of its intended specific goal or direction orientation, this alternative is designed to serve a small group of consultants (within a board) having direct involvement with a program or practice reflecting the selected goal or direction (e.g., implementing Junior Kindergartens, introducing cooperative learning strategies at the Intermediate level, implementing a new Ministry science document). However, for those consultants involved, the board must be willing to grant an average of one day a month (for 10 months) of released time for training sessions with researcher-trainers and willing to allow the adjustment to workload that enables participants to engage in practicing strategies, as well as data gathering and other activities associated with evaluating (with researcher-trainer guidance) the outcomes of their training.

The Case Studies-Profile Dimensions used in the early stages of training can be modified to reflect the system goal/directions of concern. Further, in this alternative, the action plan and practice of individual consultants are systematically monitored by researcher-trainers with individualized feedback to participants. Similarly researcher-trainers are involved

in identifying the training outcomes and in the planning associated with assessing these outcomes.

Alternative III envisions what is, perhaps, the "ideal" because of the commitment required of all those involved. However, to the extent that a feature of a system program, and its goals, can be identified as the responsibility of particular consultants, this alternative may be attractive to boards in a position to make a high level commitment to this kind of professional development.

The procedure for the second version has been pilot tested in part with consultants in Boards A and B. The pilot test led to a modification of the materials and a consensus that a more extensive field trial should be undertaken. At the time of reporting several groups of consultants are considering participating in these field tests. Version 1 (the short form) will be delivered to Family Studies consultants attending the Ontario Family Studies Coordinators' Council this fall. It is anticipated that Version 2 will be delivered to three clusters: new consultants appointed to Board A, a similar group in Board B, and a combined group of consultants working in the separate and public boards of a medium sized city in the same region as Boards A and B.

In preparation for these activities a profile placement instrument was developed (Appendix E). The instrument provides a series of open ended probes targeted on each of the dimensions; interviewee responses are used to infer strategy levels. The instrument was pilot tested with two experienced consultants who were not part of the project sample. Each interview took 45 minutes. Tapes of the interviews were independently rated by the interviewer (Maynes) and one other investigator (Ross). High levels of inter-rater reliability were obtained. Table 6 displays the results; check marks indicate exact agreement. This instrument will be used to assess the effects of the in-service.

Summary

As indicated, the training alternatives outlined focus on developing strategies associated with initiating, planning, delivering and evaluating the work of consultants. The focus on these strategies should not be interpreted as suggesting a disregard for certain personal skills and kinds of knowledge essential to the consultants' work. As suggested earlier in this discussion, we recognize the importance of such knowledge and skills. However, we believe that the strategies of concern in the training alternatives are equally important to consultant growth and effective consulting.

Footnotes

1. This research was funded by the Ontario Ministry of Education, Transfer Grant 87-1056. The report reflects the views of the authors and not necessarily those of the Ministry.

2. The original project proposal called for greater weight to be placed on goal 2 than on goal 1. During the data collection it became clear that there was far greater variety between consultants than had been anticipated and that it would be unwise to implement the design for this phase as described in the original proposal. After discussion with the Assistant Director (FS&R), a decision was made to revise the project in several ways: (a) More resources would be devoted to goal 1 by administering another round of interviews and by collecting data from an additional six consultants in a third board with substantially different characteristics than the two boards that provided the main data bank. (b) A sample of administrators would be interviewed to obtain data on the expectations for consultants and to ground the findings in the context in which the consultants work. (c) The in-service component would be developed in collaboration with the consultants involved in the project rather than separately by the investigators. (d) The in-service component would be delivered, in part, to all the consultants who provided the main data bank. (e) The quasi-experimental design for assessing the in-service would not be implemented.

3. **Lonely Runner Conference** has been held in a series of sites across the province; for example, a session was given at Niagara-on-the-Lake in 1987 under the auspices of the Ontario Public School Teachers' Federation by Ken Drope (East York Board), Norma Louks (York), Larry Mann (Peel) and Margi Willet (York).

4. The label used by Board A for this position is an uncommon one which has been changed to protect the anonymity of the board.

References

- Alpert, J. L., Weiner, L. B., & Ludwig, L. M. Evaluation of outcomes in school consultation. *Journal of School Psychology*, 1979, 17 (4), 333-338.
- Bancher, J. E., Eiseman, J. W., Cox, P. L., & Schmidt, W. H. *People, policies and practices: Examining the chain of school improvement. Vol. III: Models of Change*. Andover, Mass.: The Network, 1982.
- Bereiter, C. & Scardamalia, M. Educational relevance of the study of expertise. *Interchange*, 1986, 17 (2), 10-19.
- Bergan, J. R., & Tombari, M. Consultant skill and efficiency and the implementation and outcomes of consultation. *Journal of School Psychology*, 1976, 14 (1), 3-14.
- Berliner, D. In pursuit of the expert pedagogue. *Educational Researcher*, 1986, 15 (7), 5-13.
- Bravi, G. Discussion guide for establishment of mutual expectations. *Manitoba Association of Resource Teachers Journal*, 1983, 3 (1), 18-21.
- Broskowski, A., Khajavi, R., & Mehryar, A. An evaluation of an in-service training seminar on community consultation and education. *Journal of Community Psychology*, 1973, 1 (2), 174-176.
- Carreiro, S. The consultative resource process: A primer. *Manitoba Association of Research Teachers Journal*, April 1983, 804-808.
- Clark, C. Asking the right questions about teacher preparation: Contributions of research on teacher thinking. *Educational Researcher*, 1988, 17 (2), 5-12.
- Conley, M. Increasing students' reading achievement via teacher in-service education. *The Reading Teacher*, April 1983, 804-808.
- Conoley, J. C., & Conoley, C. W. *School consultation: A guide to practice and training*. New York: Pergammon, 1982.
- Cossairt, A., Hall, R. V., & Hopkins, B. L. The effects of experimenter's instructions, feedback and praise on teacher praise and student attending behaviour. *Journal of Applied Behaviour Analysis*, 1973, 6 (1), 89-100.
- Curtis, M. J., & Watson, K. L. Changes in consultee problem clarification skills following consultation. *Journal of School Psychology*, 1980, 18 (3), 210-221.
- Dow, I. I., & Whitehead, R. Y. *New perspectives on curriculum implementation: A survey of teacher, principal and consultant-coordinator concerns*. Toronto: OPSTF, 1981.
- Dworkin, A. L., & Dworkin, E. P. A conceptual overview of selected consultation models. *American Journal of Community Psychology*, 1975, 3 (2), 151-159.
- Firestone, W. & Corbett, H. Schools versus linking agents as contributors to the change process. *Educational Evaluation and Policy Analysis*, 1981, 3 (2), 5-17.
- Fullan, M. School district and school personnel in knowledge utilization. In R. Lehming & M. Kane (Eds), *Improving schools: Using what we know*. Beverly Hills, CA: Sage, 1981.
- Fullan, M., Anderson, S. & Newton, E. *Support systems for implementing curriculum in school boards*. Toronto: Ontario Ministry of Education, 1986.

- Gallessich, J. *The profession and practise of consultation*. San Francisco: Jossey-Bass, 1982.
- Goodwin, D. L., & Coates, T. Increasing teacher effectiveness through social systems change: Training school psychologists as change agents. *California Journal of Educational Research*, 1973, 25 (3), 147-156.
- Griffin, G., & Barnes, S. Using research findings to change school and classroom practices: Results of an experimental study. *American Educational Research Journal*, 1986, 23 (4), 572-586.
- Gutkin, T. M. Teacher perceptions of consultation services provided by school psychologists. *Professional Psychology*, 1980, 11 (4), 637-642.
- Holdaway, E. A., & Millikan, R. H. Educational consultation: A summary of four Alberta studies. *Alberta Journal of Educational Research*, 1980, 26 (3), 194-210.
- Lambert, N., Sandoval, J., & Corder, R. Teacher perceptions of school-based consultants. *Professional Psychology*, 1975, 6, 204-216.
- Leithwood, K., Ross, J. & Montgomery, D. An investigation of teachers' curriculum decision making. In K. Leithwood (Ed), *Studies in Curriculum Decision Making*. Toronto: OISE Press, 1978.
- Leithwood, K. & Stager, M. Components of expertise: "Artistry" in principals' problem solving. Paper presented at the Canadian Society for the Study of Education, Guelph, 1987.
- Loadman, W. E., & Mahan, J. M. The external consultant and curriculum change strategies. *Theory into Practice*, 1972, 11 (5), 329-339.
- Loucks, S., et al. *People, policies & practices: Examining the chain of school improvement. Vol. II: A study of dissemination efforts supporting school improvement*. Andover, Mass.: The Network, 1982.
- Louis, K. External change agents and knowledge utilization: Dimensions for analysis and action. In R. Lehming & M. Kane (Eds), *Improving schools: Using what we know*. Beverly Hills, CA: Sage, 1981.
- Louis, K., & Kell, D. *The human factor in dissemination: Field agent roles in the organizational context. Linking R&D with schools*. Cambridge, Mass.: ABT, 1981. [ED 207 266]
- Louis, K. & Sieber, S. *Bureaucracy and the dispersed organization: The educational extension experiment*. Norwood, NJ: Ablex, 1979.
- Louis, K., Rosenblum, S. & Molitor, J. *Linking R&D outcomes with local schools. Vol.II: The process and outcomes of knowledge utilization*. Cambridge, MA: Abt, 1981.
- Mannino, F., & Shore, M. The effects of consultation: A review of empirical studies. *American Journal of Community Psychology*, 1975, 3 (1), 1-21.
- Marchant, W. Counselling and/or consultation: A test of the educational model in the elementary school. *Elementary School Guidance & Counselling*, 1972, 7 (1), 4-8.
- Medway, F. J. How effective is school consultation? A review of recent research. *Journal of School Psychology*, 1979, 17 (3), 275-282.
- Miles, M., Fullan, M. & Taylor, G. *Organizational development in schools: The state of the art. Vol.III: OD consultants/OD programs in school districts*. New York, NY: Centre for Policy Research, 1978.

- Miles, M., Saxl, E. & Lieberman, A. What skills do educational 'change agents' need? An empirical view. *Curriculum Inquiry*, 1988, 18 (2), 157-193.
- Ontario, Government of. *Regulation 262. Revised regulations of Ontario, 1980 as amended to O. Reg. 761/82 under Education Act (Elementary and secondary schools and schools for trainable retarded pupils--general)*. Toronto: Queen's Printer for Ontario, April 1984.
- Randolph, D., & Wallin, K. A comparison of behavioural consultation and behavioural consultation with model-reinforcement group counselling for children who are consistently off-task. *Journal of Educational Research*, 1973, 67 (3), 103-107.
- Regan, E. M., & Winter, C. F. Perspectives on consulting practice--consultant and superintendent views. CSSE Paper, 1978.
- Roehler, L., Duffy, G., Herrmann, B., Conley, M. & Johnson, J. Knowledge structures as evidence of the 'personal': Bridging the gap from thought to practice. *Journal of Curriculum Studies*, 1988, 20 (2), 159-165.
- Runckell, P. & Bell, W. Some conditions affecting a school's readiness to profit from OD training. *Education & Urban Society*, 1976, 8, 127-144.
- Schon, D. *Educating the reflective practitioner: Toward a new design for teaching and learning in the professions*. San Francisco, CA: Jossey-Bass, 1987.
- Stennett, R. G. Ontario coordinators and consultants: Where it's at in 1974. London: London Board of Education, 1974. ONO 0770.8304
- Tyler, M., & Fine, M. The effects of limited and intensive school psychologist-teacher consultation. *Journal of School Psychology*, 1974, 12 (1), 8-16.

TABLE 1

DIFFERENCES BETWEEN EXPERIENCED AND INEXPERIENCED CONSULTANTS

	PAIR 1	PAIR 2	PAIR 3	PAIR 4	PAIR 5	PAIR 6
<u>INITIATION PHASE</u>						
1. the experienced consultant derives initiative from a system plan; the inexperienced consultant has ad hoc initiatives derived from the consultant's personal agenda and the requests of teachers/principals	✓	✓	✓	small	✓	✓
2. the experienced consultant works with a team consisting of expert teachers, principals and other consultants; the inexperienced consultant works alone or with a team of expert teachers	✓	✓	✓	small	small	small
3. the experienced consultant provides inservice for a broad array of roles; the inexperienced consultant provides inservice for teachers/heads only	✓	✓	NS	✓	✓	✓
4. the experienced consultant is active in the development and implementation phases of the CRDI cycle; the inexperienced consultant has a role in implementation alone	NS	✓	✓	✓	small	small

	PAIR 1	PAIR 2	PAIR 3	PAIR 4	PAIR 5	PAIR 6
<u>PLANNING: SETTING OBJECTIVES</u>						
5. the experienced consultant uses the system plan to identify needs; the inexperienced consultant gets needs from own perception or expressed needs of consultees	✓	✓	✓	NS	small	✓
6. the experienced consultant has wide search for data on teacher needs; the inexperienced consultant has narrow search	✓	✓	✓	small	small	✓
7. the experienced consultant tends to offer sequences of workshops; the inexperienced consultant tends to offer single workshops	small	small	✓	✓	✓	✓
8. the experienced consultant arranges a series of interactions in individual consultation; the inexperienced consultant responds to requests with single event input	✓	NS	✓	NS	NS	✓
<u>PLANNING: USE OF TEACHER PROFILES</u>						
9. the experienced consultant has a complex (multi-dimensional, multi-levelled) profile; the inexperienced consultant has a simple profile (a few levels on a single dimension)	NS	✓	NS	NS	✓	✓
<u>PLANNING: STRATEGIES FOR INTRODUCING NEW IDEAS</u>						
10. the experienced consultant uses a variety of strategies to accommodate a range of needs within a single workshop or between workshops; the inexperienced consultant tends to use the same strategy regardless of audience diversity	✓	✓	✓	✓	small	✓

	PAIR 1	PAIR 2	PAIR 3	PAIR 4	PAIR 5	PAIR 6
<u>PLANNING: PRACTICE</u>						
11. the experienced consultant provides practice in workshop setting that is closer to the actual task than does the inexperienced consultant	✓	NS	✓	✓	NS	NS
12. the experienced consultant schedules classroom practice with feedback in individual consultation; the inexperienced consultant does not	✓	✓	✓	small	NS	NS
13. the experienced consultant assigns classroom practice to be completed outside the workshop setting; the inexperienced consultant does not	✓	NS	✓	✓	NS	✓
14. the experienced consultant sequences practice to increase demands as the teacher becomes more sophisticated; the inexperienced consultant does not	✓	NS	✓	NS	NS	NS
<u>DELIVERY</u>						
15. the experienced consultant makes more substantial adjustments to plans than inexperienced consultant	✓	NS	✓	✓	✓	✓
<u>FOLLOW-UP</u>						
16. the experienced consultant has teachers report to others on their attempts to implement new ideas; the inexperienced consultant does not	✓	✓	NS	✓	small	small
17. the experienced consultant has explicit procedures for obtaining and using data on effects of inservice; the inexperienced consultant does not	✓	✓	✓	✓	small	✓

Table 2

Strategies Identified by Experienced and Inexperienced Consultants

Strategies	Experienced						Inexperienced					
	E 3	E 5	E 6	E 9	E 12	E 13	I 4	I 7	I 8	I 10	I 11	I 12
1) Consultants listen and respond to teacher needs.	✓	✓	✓	✓	✓	✓	✓	✓	✓	X	✓	✓
2) Teacher motivation is recognized as important for change.	✓	✓	✓	✓	✓	✓	✓	✓	N	✓	N	?
3) Consultant credibility - establishing trust - is essential in work with teachers.	?	✓	✓	✓	✓	✓	✓	✓	N	N	✓	✓
4) A consultant who comes on like an expert alienates teachers.	?	?	✓	✓	✓	N	✓	✓	✓	?	✓	✓
5) The principal can be a positive force or an obstacle.	✓	✓	✓	✓	✓	✓	✓	✓	✓	N	N	✓
6) Consultants identify expert teachers and use networks of expert teachers in achieving some of their objectives.	✓	✓	✓	✓	✓	✓	✓	N	N	✓	✓	✓
7) It is important for the consultant to share the same agenda as his/her clients.	✓	✓	✓	✓	✓	✓	✓	N	✓	✓	✓	✓
8) Large group sessions are good for efficient presentation of new information.	✓	✓	✓	?	✓	✓	✓	✓	✓	✓	✓	✓
9) One shot workshops are not effective.	✓	✓	✓	?	N	✓	✓	✓	✓	✓	✓	✓
10) Important, practical, how-to information can be provided for teachers through sharing and hands-on activities.	✓	✓	✓	✓	✓	N	✓	✓	✓	✓	✓	✓

Code: ✓ Agree
 X Disagree
 N No comment
 ? Ambiguous

TABLE 3

SUMMARY OF EXPECTATIONS OF ADMINISTRATORS RE THE CONSULTANT ROLE

I: CRITERIA FOR SELECTING SUPPORT STAFF

1. Implementation skill:

- .inclination and ability to incorporate desirable changes in their own programs
- .ability to help colleagues incorporate similar desirable changes

2. A conceptual as well as practical interest in the change process.

II: EXPECTED ON THE JOB GROWTH AND REFINEMENT

1. Increase in conceptual understanding of the change and curriculum management process.
2. Addition of curriculum development and review skills to implementation skills.
3. Increase in collaborative approaches to the development of initiatives and the planning and carrying out of interventions.
4. Increase in the political skills needed to interact with trustees and the public.

III: ON THE JOB PERFORMANCE EXPECTATIONS

1. Consultants are expected to work within the developed system plan.
2. Consultants are expected to collaborate with superintendents and/or consultant teams, principals or teachers.
3. Consultants are expected to search out research results and other relevant information from the full array of resources and to adapt it carefully to the local initiatives.

IV: HISTORICAL PHASES NOTED IN DEVELOPMENT OF THE CONSULTANT ROLE

- First: Subject specialists were asked to share expertise.
- Second: "Good" teachers were asked to share strategies.
- Third: Consultants were asked to understand and facilitate planned change.
- Fourth & Current: Consultants, principals and superintendents collaborate to facilitate planned change in the schools.

V: THEORETICAL HIERARCHY OF CONSULTANT ROLES WITHIN A SYSTEM

1. Coordinators: share the development of system CRDI plans with senior administration and manage the interventions required to accomplish them.
2. Consultants: are linked with administration in developing initiatives for all phases of CRDI.
3. Resource/School Support Staff: located centrally involved primarily with implementation.
4. In-school Support Staff: resources for the curriculum implementation needs within their particular schools.

TABLE 4

CONSULTANT DEVELOPMENT PROFILE

DIMENSION	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
<u>INITIATION</u>				
1. Source of the Initiative	consultant's personal agenda only	consultant's personal agenda and teacher or principal request	[teacher or principal request recognized as part of the system plan]	[initiative comes from system plans]
2. Who is Involved in Providing Consultation	consultant works alone	consultant works with expert/special teachers	[consultant works with expert teachers and school administrators]	[consultant works with other consultants; expert teachers and line staff]
3. Who is Given Help	individual teacher or teacher-student interaction	teacher groups	teachers and leaders, e.g., principals	[all roles with responsibility for program implementation]
4. Priority Setting in Responding to Requests for Consultation	"looking for work" or respond as time permits	personal priorities used to determine whether or not to respond	[system priorities used to determine whether or not to respond]	[system priorities and other relevant criteria used to structure a response]
<u>PLANNING</u>				
5. Defining Needs	consultant's personal agenda	expressed needs of teachers	[imposition of ideal behaviour without regard to actual behaviours]	[discrepancies between ideal and actual behaviours]
6. Searching for Data on Needs	narrow search based on teacher only	narrow search including intuitive assessment of selected students	wide search including principal	wide search using explicit procedures

DIMENSION	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
<u>PLANNING continued</u>				
7. Planning Workshops in a Series	"one shot workshops" offered	one shot workshops repeated for different audiences	series of workshops designed for one audience	coordinated series of workshops for several audiences
8. Responding to Requests for (a) Individual Consultation, and	pure delivery	planning/delivery sequence	[planning/delivery/ follow-up sequence]	[planning/delivery/ follow-up/ link to system sequence]
(b) Group Interactions	pure delivery	planning/delivery sequence	[planning/delivery/ follow-up sequence]	[planning/delivery/ follow-up/ link to system sequence]
9. Image of the Teacher's Performance that Governs the Design of Intervention	tabla rasa image	implicit checklist (strong on this, weak on that)	explicit checklist	explicit multi-dimensional multi-level scheme
10. Accommodating Different Needs Within the Same Workshop	treat everyone the same	provide extra input for enthusiastic teachers	sharing led by expert teacher	grouping on basis of need with different activities for each group
11. Provision of Practice Within (a) Individual Consultation, and (b) Within the Workshop	no planned practice	participants discuss teaching	participants simulate teaching	participants teach children
12. Provision of Practice Outside (a) Individual Consultation, and (b) the Workshop	no planned practice	planned practice without feedback	planned practice with feedback	sequence of practice with feedback

DIMENSION	LEVEL 1	LEVEL 2	LEVEL 3	LEVEL 4
<u>DELIVERY</u>				
13. Response to Consultee Feedback	ignores feedback	motivational adjustment	level of program profile adjustments	[changes objective and strategy within system plans]
<u>FOLLOW-UP AND EVALUATION</u>				
14. Use of Teacher Reporting as an Implementation Strategy	none planned	sharing encouraged	sharing by expert teachers planned	sharing by all teachers planned
15. Type of Data Collected to Assess Consultation	perceived satisfaction of consultee	perceived usefulness to consultee	objective indicators of teacher change	objective indicators of student change
16. Use of Evaluation Data After Consultation	no use	decision about "readiness" of the consultee for the consultant's message	planning subsequent activities with the same consultees	refinement of consultation's strategies

The levels marked in square brackets are unlikely to be reached by individual consultants in the absence of supporting conditions in the curriculum structure of the board.

TABLE 5
EXAMPLE OF MATERIALS FOR CONSULTANT IN-SERVICE
NORMA'S WORKSHOP

Purpose of the Session: To develop effective strategies for the following dimensions of consultation:

1. source of the initiative for consulting
2. searching for data on needs
3. accommodating different needs within the same workshop, and
4. providing practice within the workshop setting

Description of the Case

The P.A. day committee was planning a workshop. Norma, the P/J consultant had a good workshop on activity centres so she volunteered to do a half-day presentation for about 20 Junior teachers. The purpose of the workshop was to show how to develop an activity centre based program. Norma set up 6 to 8 activity centres for the grade 4 social studies topic "Deserts". She made a presentation to the teachers that described the centres and how they were developed. Then Norma had the teachers examine the centres in detail, making notes as they saw fit. The workshop ended with a question and answer session.

Table 3 continued

REFLECTION ON NORMA'S STRATEGY

Questions	What was Norma's Strategy?	What would your strategy be?	Level of Your Strategy	
			Your Assessment	Profile Assessment

1. What stimulated the workshop?

2. How were the needs to be met by the workshop identified?

3. How were different needs of teachers addressed in the workshop?

4. What opportunities were given to teachers to practice what they had learned in the workshop?

REFLECTION ON PERSONAL STRATEGIES

Description of Personal Case:

Opportunity for similar case in the future:

Dimensions	Past Strategy	Future Strategy	Means of Determining Effects
(a) source of the initiative			
(b) searching for data on needs			
(c) accommodating different needs within a simple workshop			
(d) providing practice within the workshop setting			

TABLE 6
INTER-RATER RELIABILITY OF PROFILE PLACEMENT INSTRUMENT

Dimension	Case A			Case B		
	Maynes	Ross	Differences	Maynes	Ross	Differences
1	4	✓		2	✓	
2	3	✓		4	✓	
3	3	2	-1	2	✓	
4	2	✓		1	2	+1
5	4	✓		4	✓	
6	3	✓		3	✓	
7	4	3	-1	3	4	+1
8a	3	✓		3	✓	
8b	3	✓		3	✓	
9	4	✓		-	-	
10	3	✓		3	✓	
11a	2	✓		4	✓	
11b	2	✓		3	✓	
12a	3	✓		4	✓	
12b	3	✓		4	✓	
13	3	✓		3	✓	
14	2	✓		1	✓	
15	3	2	-1	4	✓	
16	4	✓		3	✓	
Total	58	55		55	57	
Exact Agreement		84%			88%	
Within One Level		100%			100%	

APPENDIX A

CONSULTANT BACKGROUND INFORMATION

Name: _____ DATE: _____

School Board: _____

Age (please circle)	30 and under	41-45	over 55
	31-35	46-50	
	36-40	51-55	

Please read the following items carefully and provide the information requested for all parts of each item. If an item asks for information not relevant to your experience and/or training, simply write N/A.

Items 1-5 relate to your professional experience in your current board.

Items 6-9 relate to any professional experience in another board or boards.

Item 10 relates to career gaps, if any.

Items 11-16 relate to academic background and professional training.

Current Board Experience

1. Title of your current position:

(A) Number of years in this position:

(B) Grade levels and curriculum areas associated with your responsibilities:

2. Titles of any other consulting positions held in this board:

(A) Number of years in the position(s):

(B) Grade levels and curriculum areas associated with the position(s):

3. Number of years teaching experience in this board:
 - (A) Grade levels taught:
 - (B) Curriculum areas for which responsible:
4. Number of years administrative experience in this board:
 - (A) Kind of administrative experience:
5. Other leadership roles in curriculum development (e.g., Board committee):

Other School Boards

6. Title of consulting position(s) in other board(s):
 - (A) Number of years in the position(s):
 - (B) Grade levels and curriculum areas associated with your responsibilities:
7. Number of years teaching experience in other board(s):
 - (A) Grade levels taught:
 - (B) Curriculum areas for which responsible:
8. Number of years administrative experience in other board(s):
 - (A) kind of administrative experience:
9. Other leadership roles in curriculum development (e.g., Board committees):

Career Gaps

10. Describe any gaps in your professional career, i.e., times when you were not employed or employed in other than a school board position, or employed in a noneducational setting:

Academic Background and Professional Training

11. Undergraduate degree(s):
12. Graduate degree(s):
13. Specialist certificates obtained:
14. Academic or professional training not included in items 11, 12 and 13:
15. Describe any specific training for consulting received:
16. Describe any other training/experience, not already indicated, that you consider relevant to consulting.

APPENDIX B

Suggested Interview Guide - I

- 1) Most consultants tell us they see their jobs as one of helping teachers. Some of this help is provided in workshops and other group meetings; some in face-to-face interaction with individual teachers.
 - A) Could you describe a situation in which you think you were especially effective in helping a group of teachers.
 - 1) What was it about this group session that made it effective?
 - 2) As a rule, what kinds of goals or purposes are best served by these group meetings?
 - 3) Can you describe a meeting with teachers that was not effective, from your perspective....how do you account for this?
 - 4) In your view, what is the major factor in determining the effectiveness of group meetings as means for helping teachers?
 - 5) Approximately what proportion of your time is devoted to preparing for and participating in group meetings of teachers?
 - 6) How would you rate your personal satisfaction with group meetings as a means of helping you carry out your responsibilities?
 - B) Could you describe a situation in which you think you were especially effective in working with an individual teacher.
 - 1) What was it about this situation that made it effective?
 - 2) As a rule, what kinds of goals or purposes are best served through 1 to 1 consultation with a teacher?
 - 3) Can you describe a situation of 1 to 1 consultation that was not effective from your perspective?
 - 4) In your view, what is the major factor in determining the effectiveness of 1 to 1 consultation with a teacher?
 - 5) Approximately what proportion of your time is devoted to preparing for and participating in 1 to 1 consultations.
 - 6) How would you rate your personal satisfaction with 1 to 1 consultation as a means of helping you carry out your responsibilities.

- 2) In your efforts to help teachers, what school or board personnel are/or can be of help to you in achieving your objectives? Can you describe a particular situation in which this "help" (or lack of it) influenced the outcome of your efforts to help a teacher or group of teachers?
- 3) When consultants talk about their work with teachers, such terms as "teaching", "demonstrating", "sharing" and "problem solving" are used to describe consultations with individual teachers and groups of teachers. Do you use these strategies in working with teachers and (if so) can you describe a situation where you might use one or more of these strategies?
- 4) In reflecting on her work, one consultant said sometimes she is reminded of Bartholomew Cubbins and the 500 hats, or, alternately, of wearing a hat containg "500 arrows" to be "pulled out" accordingly.

What feelings about being a consultant do these images suggest and how close is this image to your experience?

APPENDIX C

INTERVIEW GUIDE FOR CONSULTANTS - II

INITIATION

1. Who determines the focus or substance of workshops (Ministry, Sr. Admin, Principal, Consultant)?
2. Who initiates team efforts? How do teams operate?

PLANNING:

Start out by asking the interviewee about planning for a specific group activity named in the first interview; continue with individual activities by repeating the same set of questions or asking at the end of each one: would this be similar for individual activities?

3. Re: Objectives:
 - how were the goals or purposes for this event decided?
 - if based on consultee's needs, how did the consultant find out what they were?
 - if information on consultee's felt needs was obtained, how was it used to set the objectives of the interaction (e.g. these needs might be selected from, added to or modified)
4. Re: Placement of teachers:
 - when thinking about teachers' needs, what kinds of distinctions do you make? What categories or levels of teacher needs are there?
 - if the consultant has consultees other than teachers, are distinctions made in their needs?
5. Re: Strategies for helping the teacher:
 - once you have decided what you want to accomplish in an interaction, how do you develop specific activities for achieving these purposes?
 - if more than one alternative is considered, where do the alternatives come from?
 - if more than one alternative is considered, what criteria are applied to make the choice?
6. Re: Strategies for Practice:
 - when you are planning, do you try to arrange ways for teachers to use your advice: during the consultation?
after the consultation?
7. Is your method for planning consultation written down anywhere?

DELIVERY

8. Do directions get set, or changed, during the actual interactions with clients? (in large groups, small groups, one to one)

9. What factors lead you to change your plans when you are presenting to teachers? When meeting individually?

10. Describe different kinds of work with different groups for different purposes (with teams, others).

11. What is the place of "gifts" in consultations?

FOLLOW-UP

12. By whom are follow-up needs determined? (consultant, principals, teachers themselves, alone or jointly)?

13. How is it done? (e.g. individual profile placements, other ways?)

14. What kinds of activities are included in the follow-up category? (e.g. provision of materials, providing for observation in successful classrooms, coaching or other practice opportunities, other).

15. Are follow-up activities provided for in the initial planning?

16. Is attention given to sequencing or recycling either in the initial planning (if any), or as follow-up progresses?

17. Is there a decision that follow-up is progressing satisfactorily or is complete? If so, who makes it and how?

APPENDIX D
ADMINISTRATIVE INTERVIEW GUIDE

1. Who does the system seek to fill the role of consultant or resource teacher?
2. What on-the-job growth and refinement is observed or expected?
3. What on-the-job performance is expected?
4. Historical phases noted in development of the consultant role.
5. The theoretical hierarchy of consultant roles within the system.

APPENDIX E

INTERVIEW GUIDE III

We have been talking with consultants about what they describe as effective and ineffective consulting experiences with teachers. As consultants think about these experiences, we are interested in what they see as influencing effective and ineffective consultations and in the strategies consultants use to achieve their objectives.

- (1) Could you describe a situation in which you think you were especially effective in helping a group of teachers? How was this situation different from one that you recall as less effective?
- (2) Approximately what percentage of your time is spent working with groups of teachers? Working 1 to 1 with individual teachers?
- (3) Could you describe a situation in which you were especially effective in working with an individual teacher? When you work with an individual teacher, what seems to determine whether or not the consultation is effective?
- (4) In your efforts to help teachers, what school or board personell are of help in achieving your objectives? Can you describe a particular situation in which this help (or lack of it) influenced the outcome of the consultation?
- (5) Think about a recent consultation with a group of teachers or an individual teacher. Who or what initiated the consultation? How were the objectives or goals of the consultation determined? How were teachers' needs determined? What strategies did you use to achieve your objectives? -
- (6) Do the goals of the consultation and/or your strategies change during interactions with teachers? If so, can you give me an example of goal and/or strategy change?
- (7) Again, think of a recent consultation and describe any "follow up" activities? How are follow up needs determined?

APPENDIX F

PROFILE PLACEMENT INTERVIEW
CONSULTANTS

We'll begin by calling to mind and briefly defining a couple of situations where your audience is typical, e.g.,

- .you did a workshop (or working session) for a group, OR
 - .you worked with a single individual, OR
-

- [3] 1. How common are the above?
[Probe for audience range (categories as well as numbers) and complete the identification of typical examples. If possible, one will be with a group and one with a single individual.]
- [1 & 4] 2. How come you decided to do those kinds of things, i.e., where does the initiative come from?
[use probes to push back]
Why? What role (if any) does senior administration play in these decisions?
[If requests mentioned] Do you ever refuse requests?
[If yes] Why? [Probe until any priority system is clear.]
- [2] 3. Did you work alone or with others?
[Probe re planning as well as delivery.]
Is this typical?
- [5,6 & 9] 4. How did you then decide on the specifics those interactions would address?
[Probe re data search, who/how needs defined.]
Do teachers perform differently in the classroom? How?
[Probe: what difference does that make to what you decide to do?]
- [7] 5. [Refer to the initiative and specific objectives of the group situation that has been identified.]
Was it solved in one session?
[If yes] Was it repeated for other audiences?
[If no, i.e., a series was required] Was the series repeated?
[Determine what is typical.]
- [8a] 6. [If responses to question 2 indicated requests are met:]
If a group has requested help with something, how do you go about dealing with the request?
- [8b] If an individual has requested help with something, how do you go about dealing with that?

- [10] 7. Do all the people at a workshop have similar expectations?
[If no] Have you ways to deal with that?
- [13] 8. Can you predict how everyone will respond to what you've planned for a session?
[If not always] What do you do?
[Probe re criteria for any changes made.]
- [11a,b
&
12a,b] 9. Are people ready to implement an idea if it's been well explained by the speaker?
[If no] What more do they need?
[Probe re provision for practice both within and following the workshop. Repeat probes re sessions with individuals.]
- [14] 10. What happens when a planned consultation is finished?
Does the word spread?
[If yes] How? Why?
[Is there anything that makes it happen?]
- [15 & 16] 11. Do you know whether it worked?
How?
Do you know whether it didn't work?
How?
[Probe re data and what is done with it.]